
Homeless Management Information System (HMIS)

Indiana Housing &
Community
Development Authority

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Homeless Management Information System (HMIS) New User Training Manual

A Homeless Management Information System is an electronic data collection system that stores longitudinal client-level information about persons who access homeless prevention and/or homeless services. HMIS is a valuable resource from the participating homeless assistance and homeless prevention programs in a Continuum of Care (CoC). Aggregate HMIS data can be used to understand the size, characteristics and needs of the homeless population at the local, state and national levels. The HMIS enables information about client needs, goals and service outcomes. To access the HMIS System use the link below, this link can also be accessed through the IHCD website.

<https://ihcdaonline.com>

Objectives

- Review IHCD Implementation of ClientTrack™ and important changes in data collection
- Review HMIS Security Policies and Procedures
 - Implied Consent Policy
- Learn to log in and complete the following actions:
 - Client Look-up
 - Client Entry
 - HMIS Program Data Intake Workflow
 - Enter Services
 - Case Notes
 - Complete During Program Enrollment Assessment
 - HMIS Program Data Exit Workflow
 - Submission of Issues to IHCD
 - Sign Out
- Review HMIS Contacts for IHCD

HMIS Staff

Kerrie Kikendall HMIS Program Manager, kkikendall@ihcda.in.gov, 317-234-6973

Help Desk

HMIS related issues concerning ClientTrack™ should be submitted to:

HMISHelpDesk@ihcdaonline.com

HMIS Security Policies and Procedures

Personal protected information (PPI) is considered any information that could lead to individual identification. Participating agencies should have procedures in place for the secure storage and disposal of hardcopy and electronic data generated from the HMIS or created for entry into the HMIS. PPI should be stored in locked drawers/file cabinets and hardcopy data should be shredded before disposal. Electronic PPI data including information contained on disks, CD's, jump drives, computer hard drives and/or other media should be reformatted before disposal.

Privacy and Client Information Restrictions

The Notice of Privacy Practices including the purpose for data collection should be posted in a public area and in an office where an intake professional meets with clients. The full Privacy Policy Notice is available on the IHODA website and should be made available to clients upon request.

A signed client consent form is no longer required. A client who presents to your agency for services and provides information is giving implied consent to enter and share certain data in the HMIS. However, there is some information that will not be shared with other agencies. Information that will not be shared includes HMIS Barriers, domestic violence status and case notes.

Additional information regarding client consent and restrictions will be covered in more detail during training. ***No homeless person is to be refused services regardless of their participation in HMIS.***

HMIS Computers

All computers that are used to access the HMIS should be situated in secure locations. HMIS computers in publicly accessible areas should be staffed at all times and should not be viewable by other individuals. All computers should be password protected and the password you use to log onto your computer should NOT be the same password as your HMIS password, but rather a password to prevent access to the computer itself.

Passwords

HMIS usernames and passwords should NOT be shared with other users. Users should not keep username/password information in a public location (i.e. sticky notes on monitors or filed under ClientTrack™ or Password in a Rolodex). HMIS security policies require the use of strict passwords.

- Must have at least one number
- Must be between 8 and 12 characters
- Must have at least one non-letter, non-numeric character
- Must contain at least one capital letter
- New passwords will be required upon first login
- Accounts are automatically deactivated after 30 days of inactivity

Logging In

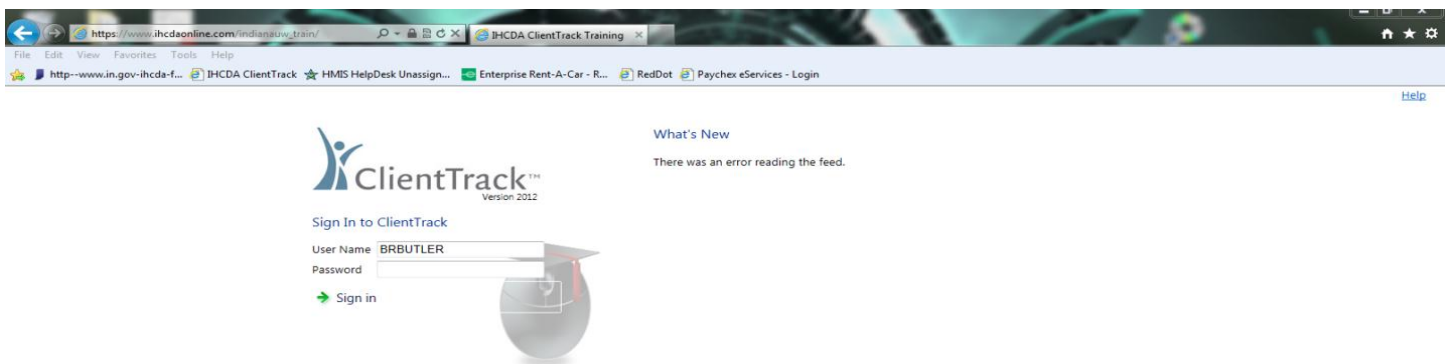
ClientTrack™ is a web-based application. In order to log into ClientTrack™ you will need to use an internet browser. ClientTrack™ will work with Microsoft Internet Explorer, Safari and Mozilla's Firefox.

User Login

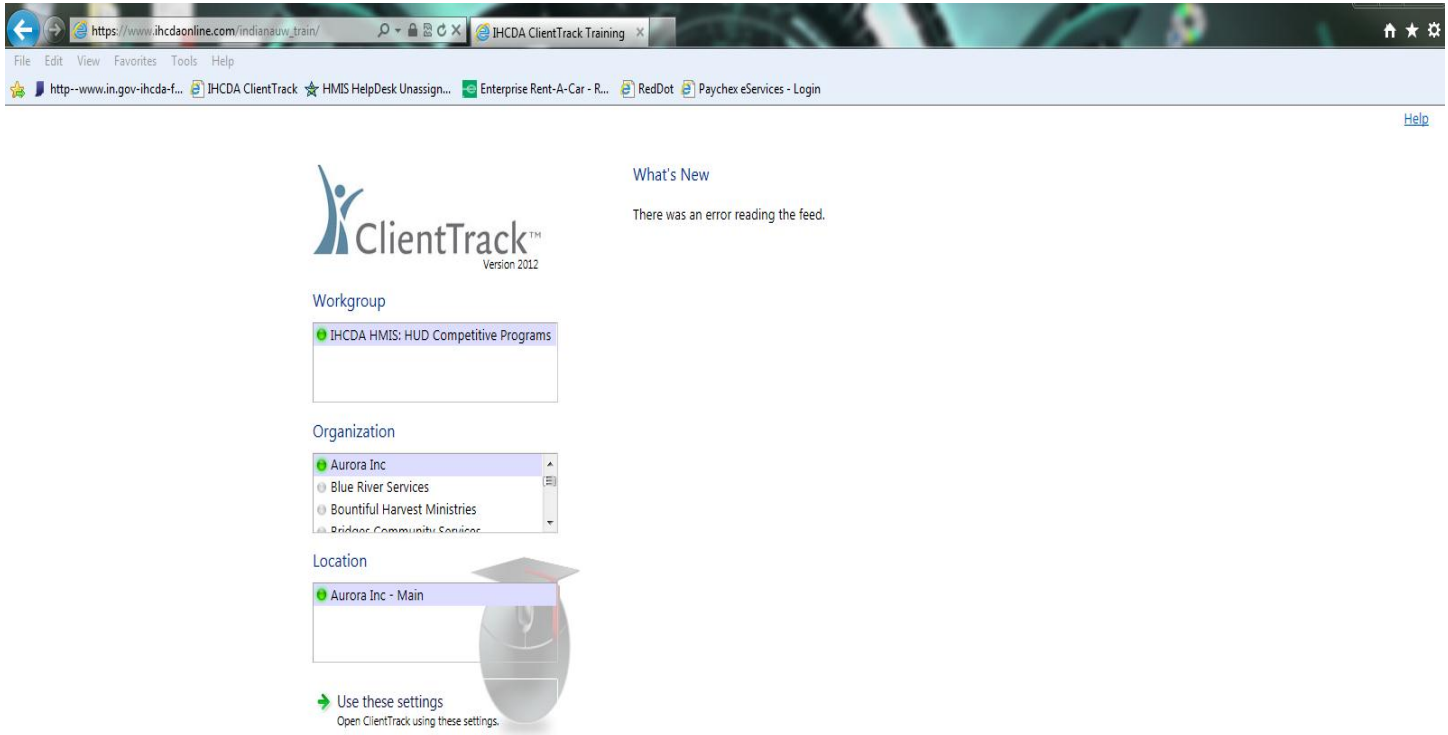
Open your web browser and go to <https://ihcdaonline.com> . Select the box labeled “ClientTrack”.



Enter your assigned User Name and Password and click “**Sign In**”. You may be required to reset your password upon your first login. **Remember, sharing your user name and password is not permitted.** Passwords are case sensitive and pop-up blockers must be turned off to access the application. You should change your settings to allow for pop-ups from this site.

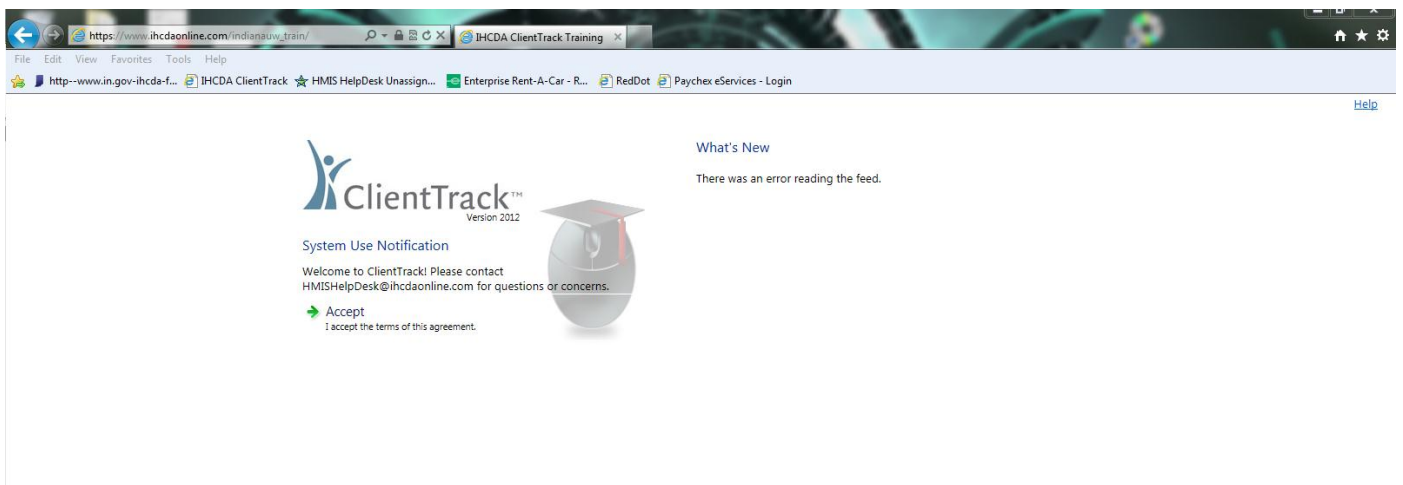


When prompted to select a workgroup, most users will select “**IHCDA HMIS: HUD Competitive Programs User**”. Your organization may participate in other workgroups, so be sure to select the appropriate workgroup. Also, make sure your organization and location is selected appropriately. Click on “**Use These Settings**” to continue.



“Accept” the Terms of Agreement

*****The HMIS Help Desk email will always be displayed on this page.***



You will be directed to your User Dashboard. You will be notified of any important “HMIS News” items that IHCDa wants to communicate to you; i.e. upcoming trainings, etc. Other features to become familiar with on this screen include Tabs (Home, Clients) and Menu Items (along the left side of the screen). Your Home screen will also give you a list of your case assignments, upcoming assessments due, paused workflows, and current program enrollments.

The screenshot shows the IHCDa ClientTrack Training User Dashboard for Brennan Butler. The dashboard includes the following sections:

- HMIS News:** WELCOME TO HMIS/CLIENTTRACK TRAINING from your administrator, Michelle Milliken. Welcome to the HMIS/ClientTrack training!! Please routinely check this area for updates and trainings from IHCDa.
- My Case Assignments:**

Client Name	Begin Date	End Date	Program
Dotty Junior, John	09/06/2012		Emergency Solutions Grant (ESG-RR)
Test, Billy	08/10/2012		Aurora - Outreach Team (SSO-R12-82)
Test, Trisha	08/13/2012		Aurora - Shelter Plus Care Program (PH-R12-82)
Test, Trisha	08/13/2012		Aurora - Street Count Non-HUD (SSO-R12-82)
Test, Trisha	08/13/2012		Aurora - Shelter Plus Care Vouchers (SSO-R12-82)
- Aurora Inc's Upcoming Assessments Due:**
 - Aurora - SHP Outreach (R12) - Aurora - Outreach Team (SSO-R12-82) - 11
 - Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PH-R12-82) - 12
 - Aurora - SPC Vouchers (R12) - Aurora - Shelter Plus Care Vouchers (SSO-R12-82) - 21
 - HPRP Balance of State - (HPRP) Region 12 - 6
- Brennan Butler's Paused Workflows:**

Workflow	Description	Started	Accessed
- Current Program Enrollments:**

Program	Cases	Clients
(HPRP) Evansville	6	8
(HPRP) Region 12	29	45
Aurora - Outreach Team (SSO-R12-82)	77	94
Aurora - Shelter Plus Care Program (PH-R12-82)	100	162
Aurora - Shelter Plus Care Vouchers (SSO-R12-82)	30	32
Aurora - Street Count Non-HUD (SSO-R12-82)	2	3
Emergency Solutions Grant (ESG-RR)	3	5

A bar chart is also visible in the bottom right corner, showing the number of cases and clients for each program.

*****The first time you log into ClientTrack, you will need to follow these instructions in order to get the Menu items along the left side of the screen to appear.***

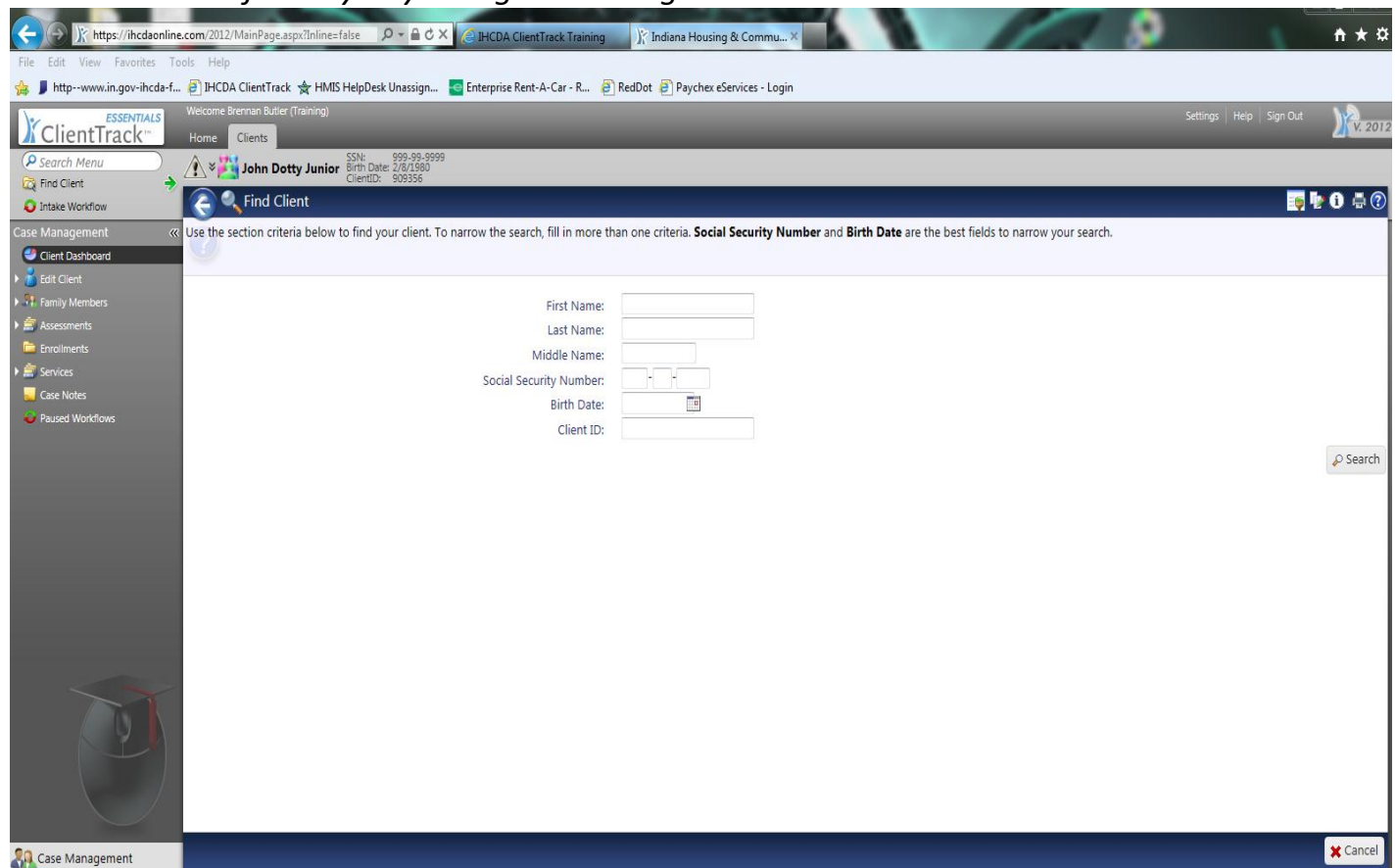
Client Look-Up

Click on the “**Client Tab**” at the top of screen. Select “**Find Client**” from the menu items along the left of the screen. Enter the name of a client that is currently enrolled in your program. Click “**Search**” in the bottom right hand corner. Select the client from the list that is displayed. Once the client dashboard is visible, click the “**Case Management**” item on the bottom left hand corner of the screen. All Menu items on the left of the screen should now be visible.

It is imperative you do not enter a duplicate client record into the system in order to ensure the accuracy and overall quality of the HMIS data. Even though ClientTrack™ will warn you of potential duplicates, it is important to search for clients and other household members prior to the start of adding a new client. To search for an existing client in the database, click the “**Find Client**” menu item on the Client tab.

Tech Note

To speed the search process and reduce the chance for input error, input as few characters as possible in the criteria fields. Also, you can use the wildcard character %. For example, J% would filter the results by any string beginning with J. Another example is %on. This would filter by any string containing 'on'.

The screenshot shows the IHCDA ClientTrack web application interface. At the top, there's a navigation bar with 'Home' and 'Clients' tabs. Below this, a 'Search Menu' dropdown is visible, with 'Find Client' selected. The main content area is titled 'Find Client' and includes a search instruction: 'Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. Social Security Number and Birth Date are the best fields to narrow your search.' The search criteria fields are: First Name, Last Name, Middle Name, Social Security Number (with a dropdown for state), Birth Date (with a calendar icon), and Client ID. A 'Search' button is located at the bottom right of the search area. The left sidebar shows a 'Case Management' menu with options like 'Client Dashboard', 'Edit Client', 'Family Members', 'Assessments', 'Enrollments', 'Services', 'Case Notes', and 'Paused Workflows'. The bottom of the screen has a 'Case Management' label and a 'Cancel' button.

You may search for a client by entering letters of the client first/last name, social security number or birth date. It is important to try different options for your search. It is best to **only** enter the first few letters of the first/last name and not rely solely on a social security number or birth date, as those elements have a higher rate of missing or inaccurate data. Another search hint is to search different spellings and remember to search for nicknames such as “Bob” in addition to “Robert” or “Bill” in addition to “William”.

3 records found.

First Name ▲	Last Name ▲	Middle Name ▲	SSN ▲	Birth Date ▲	Client ID ▼
Testing	Test		XXX-XX-2342	01/01/1980	909359
Test	Test Child			01/01/1999	909129
Test	Test		XXX-XX-2568	01/01/1982	909128

If the client is already in the system, highlight the client name in the search results and click **“Client Name”** to select. The selected client’s information will be displayed at the top of the screen. All information entered from this point forward while on the Client Tab will be associated with the currently selected client. You should click on the **“Edit Client Information”** menu item and make any necessary changes to the client demographic information.

*****Please remember, the “Save” button will save the changes you made to the screen and leave you on the same page. The “Save & Close” button will save the changes you have made to the screen and move you to the next one.***

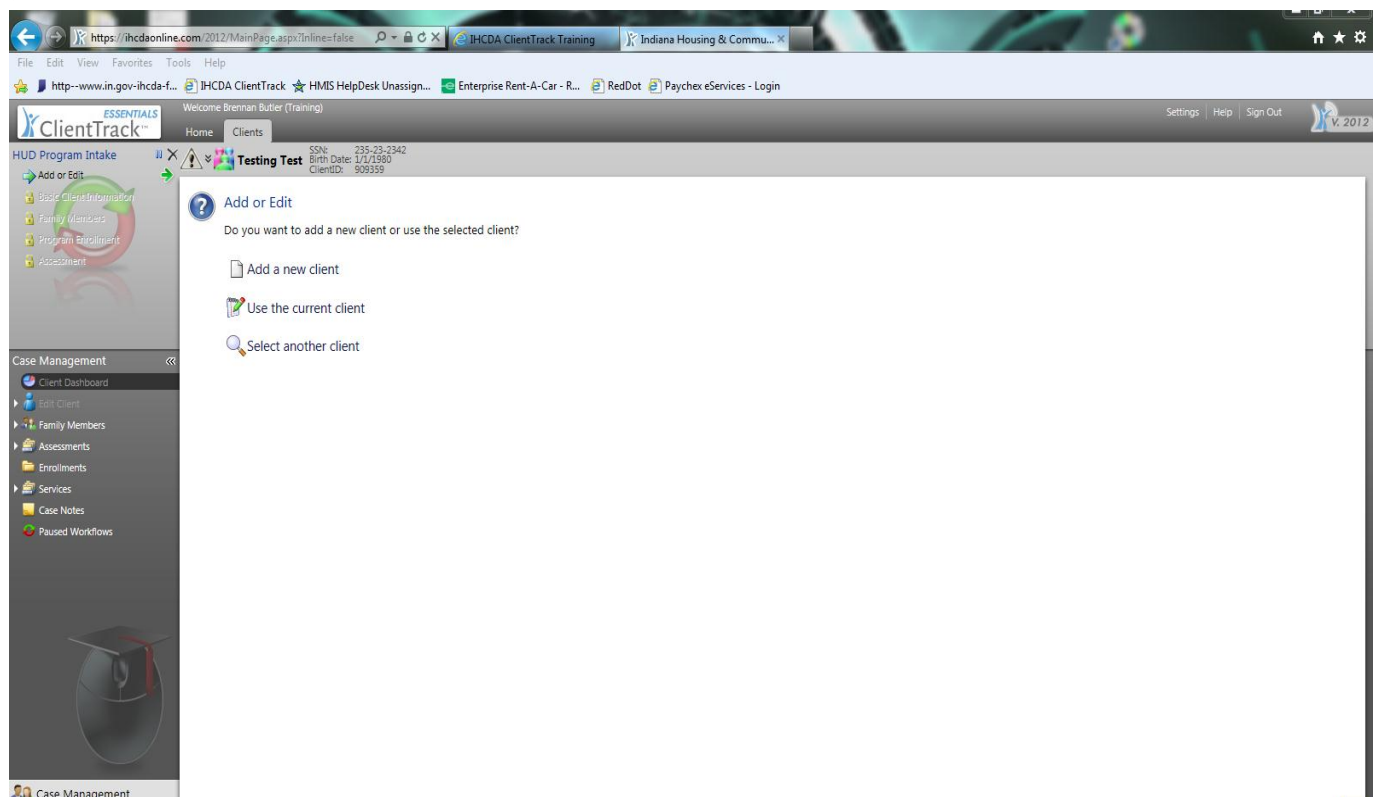
Add a New Client

In order to ensure all required assessments are completed, ClientTrack™ utilizes a specific workflow that steps you through this process. Using these built-in workflows, you will step through these processes automatically. Click the **“Workflow”** option that is appropriate. **Be sure you begin the workflow while you are on the client record for the Head of Household.** You will be asked to verify the intake information for the client.

Make any changes if necessary and click **“Save”**. If there are no changes, click **“No Changes”**.

The steps for the workflow will be displayed in the upper left hand corner of the screen. The first step is the completion of the Master Assessment. On the Master Assessment screen, be sure to change the Assessment Date if different from today's date.

To add a **NEW** client to the database, select the **“Intake Workflow”** menu item to the left. Choose the appropriate button **“Add a New Client”**. If a duplicate client already exists (and was not identified during the client lookup), a warning in red letters will be displayed. It is very important to review the displayed list. If the client is already in the system, click the client's name to select. If the client you are entering is in fact a new client (do NOT select a client in the displayed list), click **“Next”** to proceed with the intake process.



****IHCD is always working to eliminate duplicate clients in the HMIS. Please contact the IHCD HMIS Help Desk at HMISHelpdesk@ihcdaonline.com with clients that have multiple records in the system. When sending a notification of duplicates or any information regarding clients to the HMIS Help Desk please DO NOT include a full social security number. Client ID numbers can be found to the left of the client name on the client lookup screen or above the client name on the client dashboard.**

The Workflow

To search for a client in the system, type the first few letters of the first name and last name, and then click on the “**Next**” button on the bottom of the screen. (This will automatically search for client a second time.)

The screenshot shows the IHCDA ClientTrack web application. The browser address bar displays the URL <https://ihcdaonline.com/2012/MainPage.aspx?Inline=false>. The application header includes the 'ClientTrack' logo and a welcome message for 'Brennan Butler (Training)'. The left sidebar contains navigation links for 'HUD Program Intake' (Basic Client Information, Family Members, Program Enrollment, Assessment) and 'Case Management' (Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Case Notes, Paused Workflows). The main content area is titled 'Search Existing Clients' and contains a search form with the following fields:

First Name *	Ivy
Last Name *	Flowers
Social Security Number	315 -86 -9789
Birth Date	02/08/1980

At the bottom right of the form, there are 'Next' and 'Pause' buttons. A 'Basic Client Information' link is also visible in the top right corner of the main area.

Once you have searched for the client and click “**Next**”, you will be prompted to enter demographic information for the client. Items with a red asterisk * are required fields and records cannot be saved without entering this data. Birthdate and Phone Number fields are auto-formatted so that dashes are not required when entering information in these fields. Birthdates can be entered in mmddyyyy format. Once entered, they will be automatically formatted to the appropriate display. Click on the “**Next**” button when finished.

The screenshot displays the 'Basic Client Information' form in the IHODA ClientTrack Training application. The form is divided into several sections: 'Basic Client Information', 'Basic Client Demographics', 'Family Information', and 'Contact Information'. The 'Basic Client Information' section includes fields for First Name (Ivy), Last Name (Flowers), Middle Name, Suffix, and Social Security Number (315-50-5789). The 'Basic Client Demographics' section includes Birth Date (02/08/1980), Client Age (32), Date of Birth Quality (Full DOB Reported), Ethnicity (Non-Hispanic/Latino), Race (American Indian or Alaska Native, Black or African American, Native Hawaiian or Other Pacific Islander, White, Other or Unknown), Gender (Female), and IHOPE Number. The 'Family Information' section includes Family (Flowers, Ivy - 1980) and Relationship to Head of Household (Self). The 'Contact Information' section includes Address, City/State/Zip, Home Phone, and Email.

First Name – Legal first name (do not add nicknames in “quotes” – those are not searchable elements, add this information to the alias field)

Last Name – Legal Last Name

Social Security Number – If the client does not know or refuses to provide their SSN, **DO NOT** under any circumstance, enter a fake social security number such as **123-45-6789** or **999-99-9999**. Select the data quality option that best fits the situation.

Birth Date – Month, day and year the client was born. Again, do not use a fake number. Choose the appropriate data quality option that best fits the situation

Ethnicity – Determines if a client is of Hispanic/Latino origin and includes individuals of Cuban, Mexican, Puerto Rican, South or Central American origin

Race– This is a self-identified data element and a person can identify with multiple races. This is a multi-select box that allows for multiple races to be checked

Gender – Select gender with which client identifies

IHOPE Number – This is an optional field

Household – Do NOT enter anything in the Household field. ClientTrack™ will create a household/household account

Relationship to Head of Household – When entering the first client in the household, the system will default to “Self”. It is imperative this information is entered correctly for ALL household members. Otherwise,

your reports will not accurately reflect the clients and household make-up

Address – Add the address where client will be residing (emergency shelter, etc.). This is NOT the previous address of the client

Click on the **“Finish”** button when completed.

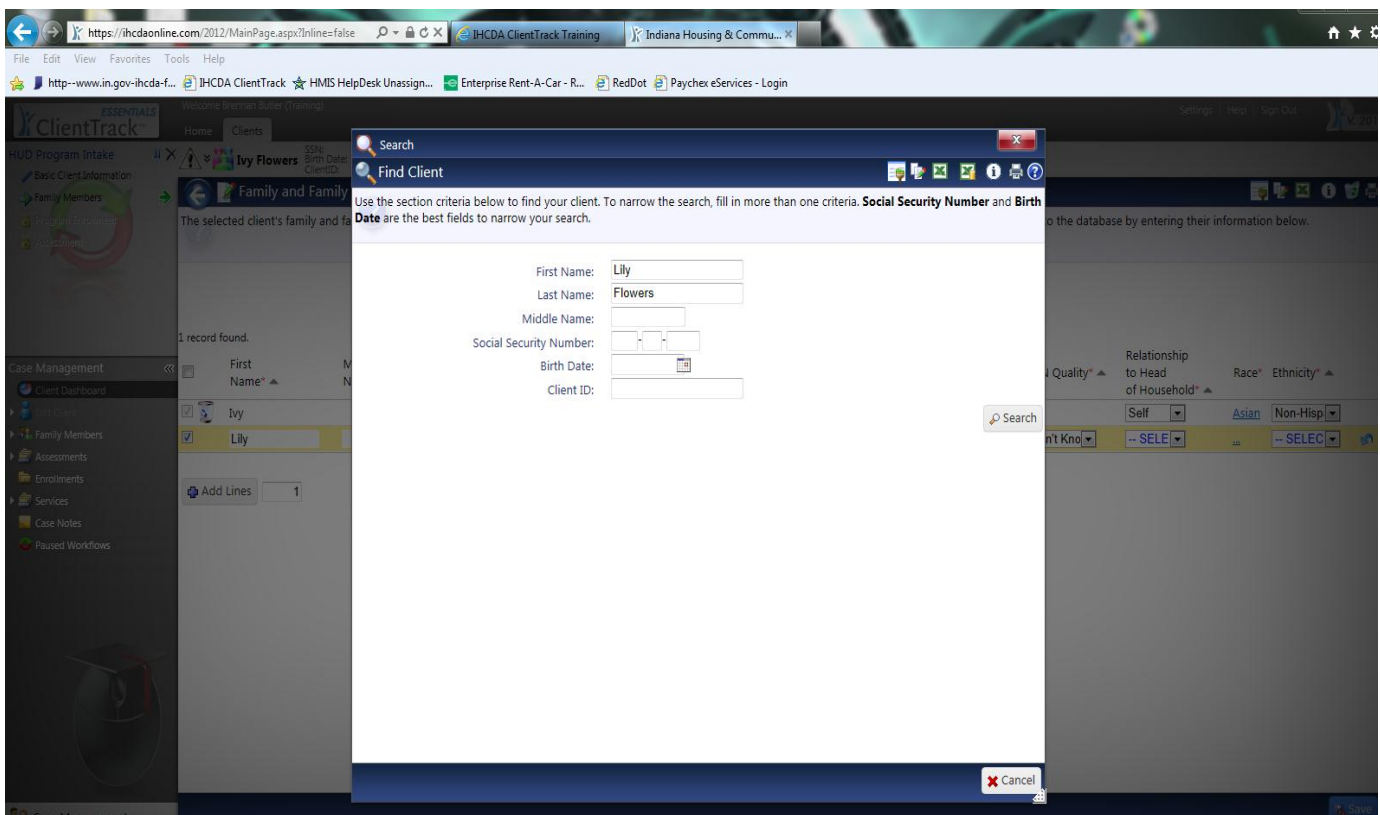
Add Household Members

Next, you will be prompted to add any additional household members.

The screenshot shows the 'Family and Family Members' page in the IHCDA ClientTrack system. The page displays a table of family members for the client 'Ivy Flowers'. The table has columns for First Name, Middle Name, Last Name, Gender, Birth Date, Age, Birth Date Quality, SSN, SSN Quality, Relationship to Head of Household, Race, and Ethnicity. Two rows are shown: 'Ivy' and 'Lily'. The 'Lily' row has a yellow background and a magnifying glass icon next to the last name 'Flowers'. Below the table, there is an 'Add Lines' button and a text input field with the number '1'. A 'Save' button is at the bottom right.

First Name	Middle Name	Last Name	Gender	Birth Date	Age	Birth Date Quality	SSN	SSN Quality	Relationship to Head of Household	Race	Ethnicity
Ivy		Flowers	Female	02/08/1980	32	Full DOB	315 - 86 - 9789		Self	Asian	Non-Hisp
Lily		Flowers	-- SELECT --		N/A	Don't Know		Don't Know	-- SELE		-- SELEC

Select the **“Household Type”**. Click on the **“Empty Box”** and a check mark will appear. Enter the name of the next household member, the system will complete a search for that client name.



If the client is found, select the client from the list and edit as necessary. Select **“Cancel”** if the client is not found in the system.

Please be sure to complete all information requested. For the race category, you must click on the blue line with the three blue dots to access the race categories. Be sure to select a race and then click on the **“Green Circle”** with the check mark. Be careful that you do not use the select all icon. Add lines for additional household members as necessary by clicking on the **“Add Lines”** box.

Click the **“Save”** button when all household members have been added. You will receive an error message if you are missing any required data fields. If you receive this error message, review the information and input any missing data.

Family Name: Family Type:

2 records found.

First Name	Middle Name	Last Name	Gender	Birth Date	Age	Birth Date Quality	SSN	SSN Quality
Ivy		Flowers	Female	02/08/1980	32	Full DOB	315 - 86 - 9789	
Lily		Flowers	Female	06/01/2005	7	Full DOB	235 - 97 - 8678	

Add Lines:

You will then be prompted to create the enrollment.

*****Remember to change the Enrollment Date if you are back dating the information. To ensure accurate data quality enter all client data in a timely manner.***

Name: Flowers, Ivy

Enrollment Date:

HUD Grant:

Program:

Family

Family:

Relationship to Head of Household:

Case Manager

Case Manager:

Restriction: ☐ Restrict to Organization ☒ Unrestricted

You will be required to choose the HUD Grant and Program and click **“Next”**. *If you do not find your specific grant and/or program, cancel the workflow by click the **“X”** and please notify IHCD immediately at HMISHelpDesk@ihcdaonline.com. Please include the name of your grant and program along with specific contact information so that the issue can be resolved as soon as possible. Grant and program information must be set up in the system before you can begin to enroll clients. Click the **“Save”** button when completed.*

The screenshot displays the 'Universal Data Assessment' form in the IHCD ClientTrack system. The form is for a client named Ivy Flowers (SSN: 315-86-9789, Birth Date: 2/6/1980, Client ID: 909562). The assessment date is 09/07/2012, and the assessor is Brennan Butler. The program selected is Aurora - Shelter Plus Care Program (PH-R12-S2). The client is a veteran (Veteran Status: Yes) and has a disabling condition (Disabling Condition: Yes). The military branch is Marines, and the service era is Post September 11, 2001 (September 11, 2001 - Present). The duration of active duty is 24 months, and the discharge status is Honorable. The client served in the War Zone. The prior residence is Emergency shelter, and the length of stay is One to three months. The prior zip code is 46221, located in Indianapolis, IN. The housing status is Literally Homeless, and the client has been continuously homeless for a year or more. The chronically homeless determination is Yes, with the restriction set to Restrict to Organization.

You will now begin a series of required assessments that will finalize the household enrollment. Make sure to properly check **“Yes or No”** for the Veteran Status and Disabling Condition. Certain logic is built into the system that will provide for additional drop down menu options based on the way in which certain client data is entered. Because this client is a veteran, additional questions are required to be answered.

Here is an example of the optional Veteran Information:

The screenshot shows a web-based form titled "Veteran Information". At the top, there are two dropdown menus: "Veteran Status:" with "Yes" selected and a blue information icon, and "Disabling Condition:" with "No" selected and a blue information icon. Below these, the "Veteran Information" section contains several fields: "Military Branch:" with "Marines" selected, "Service Era:" with "Post September 11, 2001 (September 11, 2001 -Present)" selected, "Duration of Active Duty (Months):" with "24" entered, "Discharge Status:" with "Honorable" selected, and "Served War Zone:" with radio buttons for "Yes" (selected), "No", "Don't Know", and "Refused".

Assessment Date – Date the assessment was completed with the client (field will auto-fill with today's date)

Residence Prior to Program Entry – Identify where the client was staying on **the night before** the client is enrolled in your program

Length of Stay – Identify the length of stay for the residence prior to program entry

Prior Zip Code – Remember this is the *zip code of the client's last permanent residence of 90 days or more*. The system allows you to look up the zip code if the client knows the city, but not the specific zip code. Click on the look up icon and type in the city and state and a list of potential matches will be displayed. Choose one of the zip codes from list provided

Housing Status – Choose the appropriate category for the housing status of the household. More extensive definitions can be found by clicking the blue information circle next to the drop down box

HMIS Barriers Assessment

The built in logic may create additional fields that are required. All fields with a red * are required. If the client has no barriers, click on the **"No Barriers"** button in the lower right hand corner. Only select yes if barrier is present. It is important to keep in mind clients must have at least one barrier to be eligible for some programs (such as Shelter + Care). Click **"Save & Close"** when completed.

Barrier	Help	Barrier Present?	Date Identified	Receiving Services / Treatment	Condition is Indefinite	Explanation
Alcohol Abuse	?	-- SELECT --				
Developmental Disability	?	-- SELECT --				
Drug Abuse	?	-- SELECT --				
HIV/AIDS	?	-- SELECT --				
Mental Health	?	-- SELECT --				
Physical Disability	?	-- SELECT --				
Chronic Health Condition		Yes	09/07/2012	Yes		

Domestic Violence Assessment

Note that if you say "Yes" an additional field named "When Experience Occurred" will be required. Click **"Save"** when completed.

Assessment Date: 09/07/2012

Domestic Violence Experience: ☒ Yes
☐ No
☐ Don't Know
☐ Refused

When Experience Occurred: Three to six months ago

Restriction: ☐ Restrict to Organization
☒ Unrestricted

Financial Assessment Cash Benefits

An Income Assessment will be completed for EACH household member. You must answer the question of income received and non-cash benefits. **Note:** *Income received by a household member such as child support, TANF, WIC and food stamps should be designated on the assessment of the household member who directly receives payment.* If an adult receives a SSI or SSDI benefit on behalf of a child, that income should be

designated on the income assessment of the child. It is very important that income (cash or non-cash) is properly designated on the proper client assessment.

Earned Income – Employment income

Other Income – Any income not previously listed

Unemployment Insurance – Unemployment benefits from the State

Private Disability Insurance – Non-government funded disability payments

Worker's Compensation – Income for individual who has been injured on the job

Self-Employment – Income earned by an individual who works for themselves

Supplemental Security Income – A federal program that provides additional income for older and disabled people with little to no income stream

Veteran's Disability Payment – Disability payment provided by the Department of Veteran's Affairs

Social Security Disability Income – A monthly compensation to individuals who can no longer work due to their medical conditions

Retirement (Social Security) – Income payment provided by government for individuals that qualify

Other Pension – Cash payment made from a private employer

Veteran's Pension – Cash payment made by the Department of Veteran's Affairs

Veteran's Disability Payment – A benefit paid to a veteran because of injuries or diseases that happened while on active duty, or were made worse by active duty

Child Support – Income received from one parent to another to care for children

TANF – Temporary Assistance for Needy Families

General Assistance – Cash from household or friends, trustee or church/non-profit

Click **"Save and Close"** when completed.

Indicate below the client's sources of **monthly** income/benefits.

Assessment Active

Assessment Date: 09/07/2012
Income Received: Yes
Non-cash Benefits: Yes
Income Group: Cash Income

Type	Description	Monthly Amount	Restriction
<input checked="" type="checkbox"/>	Earned Income	\$500.00	Unrestricted
<input type="checkbox"/>	Other Income		Unrestricted
<input type="checkbox"/>	Unemployment Insurance		Unrestricted
<input type="checkbox"/>	Private Disability Insurance		Unrestricted
<input type="checkbox"/>	Worker's Compensation		Unrestricted
<input type="checkbox"/>	Self Employment		Unrestricted
<input type="checkbox"/>	Supplemental Security Income		Unrestricted
<input type="checkbox"/>	Social Security Disability Income		Unrestricted
<input type="checkbox"/>	Retirement (Social Security)		Unrestricted
<input type="checkbox"/>	Other Pension		Unrestricted
<input type="checkbox"/>	Veteran's Pension		Unrestricted
<input type="checkbox"/>	Veteran's Disability Payment		Unrestricted
<input checked="" type="checkbox"/>	Child Support	\$500.00	Unrestricted
<input type="checkbox"/>	TANF		Unrestricted
<input type="checkbox"/>	General Assistance	\$200.00	Unrestricted

Count/Total Monthly Income: 2 \$700.00

Restriction: ☐ Restrict to Organization ☒ Unrestricted

Financial Assessment Non-Cash Benefits

This assessment is specific to individual – not the household in general. An assessment for non-cash benefits will be completed for each household member.

Food Stamps/Money for Food on Benefits Card – Monthly payments provided to individual in advance in a tax refund, Food Stamps (Snaps) – A stamp or coupon, issued by the government to persons with low incomes that can be redeemed for food at stores

MEDICAID – A joint federal and state program that helps low-income individuals or families pay for the costs associated with long-term medical and custodial care provided they qualify. Although largely funded by the federal government, Medicaid is run by the state where coverage may vary

MEDICARE – A federal program that pays for certain health care expenses for people aged 65 or older

Special Supplemental Nutrition Program for Women, Infants and Children (WIC) – A program geared toward supplying nutritional food for at risk pregnant women and their families.

Veteran's Administration Medical Services - Health care benefits and services provided for Veterans

Section 8, Public Housing or Other Rental Assistance – Low- and moderate-income

housing subsidized by the federal Department of Housing and Urban Development
Other Source – Any source not previously listed above.

Click “Save and Close” when completed.

The screenshot shows the 'Financial Assessment' form in the IHCDA ClientTrack system. The form is for client 'Ivy Flowers' (SSN: 315-86-9789, Birth Date: 2/6/1980, ClientID: 909362). The 'Assessment Date' is 09/07/2012, and 'Income Received' is 'Yes'. The 'Non-cash Benefits' are set to 'Yes'. The 'Income Group' is 'Non-cash Benefit'. The form displays a table of income sources with 7 records found. The table has columns for 'Type', 'Description', 'Monthly Amount', and 'Restriction'. The first two records are 'Food Stamps/Money for food on benefits card' and 'MEDICAID', both with a monthly amount of \$300.00 and 'Unrestricted' restrictions. The other five records are 'MEDICARE', 'Special Supplemental Nutrition Program for Women, Infants, and Children', 'Veteran's Administration Medical Services', 'Section 8, Public Housing, or Other Rental Assistance', and 'Other Source', all with 'Unrestricted' restrictions. At the bottom, the 'Count/Total Monthly Income' is 2, totaling \$300.00. The 'Restriction' is set to 'Unrestricted'. The form includes 'Save' and 'Save and Close' buttons.

Type	Description	Monthly Amount	Restriction
<input checked="" type="checkbox"/>	Food Stamps/Money for food on benefits card	\$300.00	Unrestricted
<input checked="" type="checkbox"/>	MEDICAID		Unrestricted
<input type="checkbox"/>	MEDICARE		Unrestricted
<input type="checkbox"/>	Special Supplemental Nutrition Program for Women, Infants, and Children		Unrestricted
<input type="checkbox"/>	Veteran's Administration Medical Services		Unrestricted
<input type="checkbox"/>	Section 8, Public Housing, or Other Rental Assistance		Unrestricted
<input type="checkbox"/>	Other Source		Unrestricted

Employment Assessment

When filling out the Employment Assessment keep in mind the built in logic may require you to fill out additional information. Click “Save” when completed.

The screenshot shows the 'Employment Assessment' form in the IHCDA ClientTrack system. The form is for client 'Ivy Flowers' (SSN: 315-86-9789, Birth Date: 2/6/1980, ClientID: 909362). The 'Assessment Date' is 09/07/2012. The 'Employed?' status is 'Yes'. The 'Hours Worked In Last Week' is 20.00. The 'Employment Tenure' is 'Permanent'. The 'Looking for additional employment / increased hours' status is 'Yes'. The 'Restriction' is set to 'Unrestricted'. The form includes a 'Default Last Assessment' button and 'Save' and 'Pause' buttons.

Adult Education Assessment

When filling out the Adult Education Assessment, remember certain answers will prompt the built in logic to require more information. Please note that if a client has had

some secondary education, but has received a degree you should select “**Post-Secondary School**” and the select “**None**” in the Secondary Education box. Click “**Save**” to continue.

The screenshot shows the IHCDA ClientTrack web application. The left sidebar contains navigation links for HUD Program Intake, Assessment, Case Management, and Health. The main content area is titled 'Adult Education Assessment' for client 'Ivy Flowers'. It includes fields for 'Assessment Date' (09/07/2012), 'Currently in School / Working on Degree' (Yes), 'Received Vocational Training/Apprenticeship' (Yes), and 'Highest Grade Completed' (Post-secondary school). A dropdown menu for 'Secondary Education' is open, showing options: None, Associates Degree, Bachelors (selected), Masters, Doctorate, and Other postsecondary/nontraditional degree. There is also a 'Restriction' section with radio buttons for 'Restrict to Organization' and 'Unrestricted' (selected). At the bottom right, there are 'Save' and 'Pause' buttons.

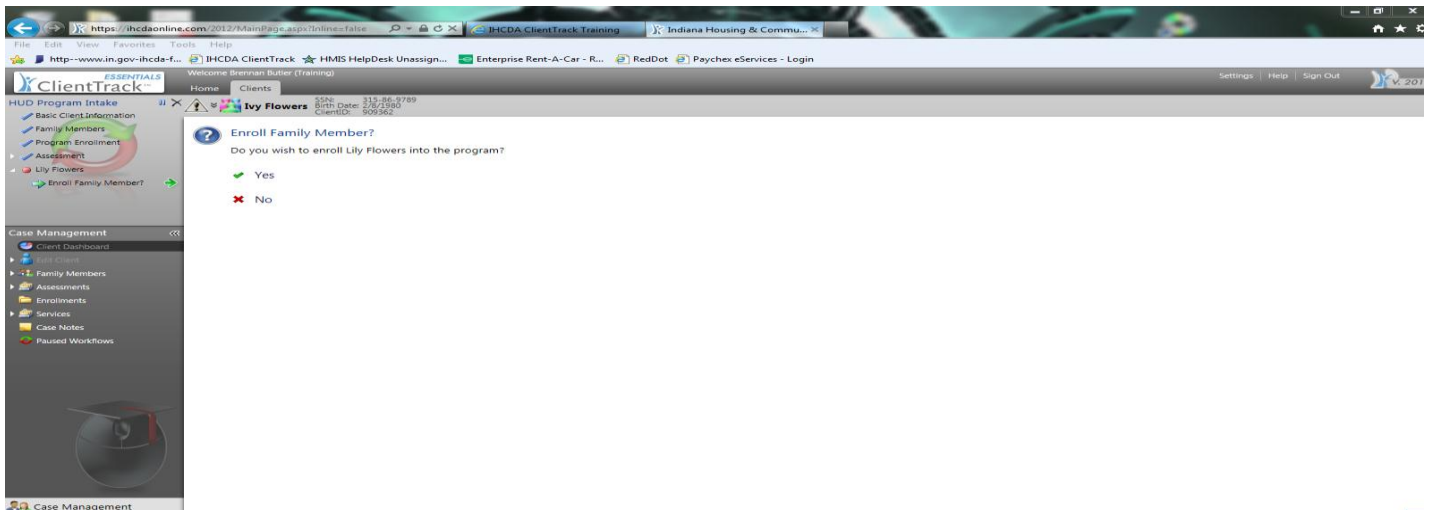
Health Assessment

Note: (Female Only) If you say “Yes” to the Pregnancy Status, it will ask you for the Due Date of the unborn child. Click “**Save**” when completed.

The screenshot shows the IHCDA ClientTrack web application with the 'Health Assessment' form for client 'Ivy Flowers'. The form includes fields for 'Assessment Date' (09/07/2012), 'General Health Status' (Excellent), and 'Pregnancy Status' (No). There are also radio buttons for 'Don't Know', 'Refused', 'Restrict to Organization', and 'Unrestricted' (selected). At the bottom right, there are 'Save' and 'Pause' buttons.

Enrollment process for Child and/or other Household Member

Click the “Yes” button.



Universal Data Assessment

Assessment Date – Date the assessment was completed with the client (field will auto-fill with today’s date)

Veteran Status – Identify if this client is a Veteran, if you select “Yes” additional information will be required

Disabling Condition – Identify if this client has any disabilities

Residence Prior to Program Entry – Identify where the client was staying on the night before the client is enrolled in your program

Length of Stay – Identify the length of stay for the residence prior to program entry

Prior Zip Code – Remember this is the *zip code of the client’s last permanent residence of 90 days or more*. The system allows you to look up the zip code if the client knows the city, but not the specific zip code. Click on the look up icon and type in the city and state and a list of potential matches will be displayed. Choose one of the zip codes from list provided.

Housing Status – Choose the appropriate category for the housing status of the household. More extensive definitions can be found by clicking the blue information circle next to the drop down box.

Chronic Homeless Assessment - In order for a client to be chronically homeless, they must be unaccompanied; and continually homeless for a year or more or 4 episodes of homelessness in a 3 year period; and have a substance abuse disorder, serious mental illness, developmental disability or a chronic physical

illness or disability. When the qualifying conditions are checked appropriately, the system will indicate the client's status of chronically homeless.

Once the Universal Data Assessment is completed, click **"Save"**.

The screenshot shows the 'Universal Data Assessment' form in the IHCD ClientTrack system. The form is for client 'Lily Flowers' (ESN: 235-97-8678, Birth Date: 6/1/2005, ClientID: 909363). The form includes sections for 'Assessment Date' (09/07/2012), 'Age at Assessment' (7), 'Assessment Type' (Entry), 'Program' (Aurora - Shelter Plus Care Program (PH-R12-82)), and 'Assessor' (Brennan Butler). It also has fields for 'Veteran Status' (No), 'Disabling Condition' (No), 'Prior Residence' (Emergency shelter, Length of Stay: One to three months), 'Prior Zip Code' (46221, City: Indianapolis, State: IN), 'Housing Status' (Literally Homeless), and 'Chronically Homeless Determination' (No, Restriction: Restrict to Organization). The form has a 'Save' button at the bottom right.

HMIS Barriers

The built in logic may create additional fields that are required. All fields with a red * are required. If the client has no barriers, click on the No Barriers button in the lower right hand corner. It is important to keep in mind that clients must have at least one barrier to be eligible for some programs (such as Shelter + Care). Click **"Save & Close"** when completed.

The screenshot shows the 'Barriers' form in the IHCD ClientTrack system for client 'Lily Flowers'. The form displays a table of barriers with columns: Barrier, Help, Barrier Present?*, Date Identified, Receiving Services / Treatment, Condition is Indefinite, and Explanation. The table lists several barriers: Alcohol Abuse, Developmental Disability, Drug Abuse, HIV/AIDS, Mental Health, Physical Disability, and Chronic Health Condition. Each barrier has a 'Barrier Present?' dropdown menu set to 'SELECT'. The form also has a 'Save' button and a 'No Barriers' button at the bottom right.

Barrier	Help	Barrier Present?*	Date Identified	Receiving Services / Treatment	Condition is Indefinite	Explanation
Alcohol Abuse	?	SELECT				
Developmental Disability	?	SELECT				
Drug Abuse	?	SELECT				
HIV/AIDS	?	SELECT				
Mental Health	?	SELECT				
Physical Disability	?	SELECT				
Chronic Health Condition	?	SELECT				

Financial Assessment Cash Benefits

Remember this is the financial assessment for the second household member (and in this case, a child). Children are typically only going to have minimal options on this list such as SSI (death benefits). TANF, Food Stamps and Child Support remain as income for the parent/guardian – not the child.

Earned Income – Employment income

Other Income – Any income not previously listed

Unemployment Insurance – Unemployment benefits from the State

Private Disability Insurance – Non-government funded disability payments

Worker's Compensation – Income for individual who has been injured on the job

Self-Employment – Income earned by an individual who works for themselves

Supplemental Security Income – A federal program that provides additional income for older and disabled people with little to no income stream

Veteran's Disability Payment – Disability payment provided by the Department of Veteran's Affairs

Social Security Disability Income – A monthly compensation to individuals who can no longer work due to their medical conditions

Retirement (Social Security) – Income payment provided by government for individuals that qualify

Other Pension – Cash payment made from a private employer

Veteran's Pension – Cash payment made by the Department of Veteran's Affairs

Veteran's Disability Payment – A benefit paid to a veteran because of injuries or diseases that happened while on active duty, or were made worse by active duty

Child Support – Income received from one parent to another to care for children

TANF – Temporary Assistance for Needy Families

General Assistance – Cash from household or friends, trustee or church/non-profit

Click "**Save and Close**" when completed.

The screenshot shows the 'Financial Assessment' form for a client named Lily Flowers. The form is titled 'Financial Assessment' and includes a sub-header 'Indicate below the client's sources of monthly income/benefits.' The form is divided into sections for 'Assessment Active', 'Income Received', and 'Non-cash Benefits'. The 'Income Received' section is expanded, showing a list of 15 records found. The table below shows the details of these records.

Type	Description	Monthly Amount	Restriction
<input type="checkbox"/>	Earned Income		Unrestricted
<input type="checkbox"/>	Other Income		Unrestricted
<input type="checkbox"/>	Unemployment Insurance		Unrestricted
<input type="checkbox"/>	Private Disability Insurance		Unrestricted
<input type="checkbox"/>	Worker's Compensation		Unrestricted
<input type="checkbox"/>	Self Employment		Unrestricted
<input type="checkbox"/>	Supplemental Security Income		Unrestricted
<input type="checkbox"/>	Social Security Disability Income		Unrestricted
<input type="checkbox"/>	Retirement (Social Security)		Unrestricted
<input type="checkbox"/>	Other Pension		Unrestricted
<input type="checkbox"/>	Veteran's Pension		Unrestricted
<input type="checkbox"/>	Veteran's Disability Payment		Unrestricted
<input type="checkbox"/>	Child Support		Unrestricted
<input type="checkbox"/>	TANF		Unrestricted
<input type="checkbox"/>	General Assistance		Unrestricted

Count/Total Monthly Income: 0 \$0.00
 Restrictions: ☐ Restrict to Organization ☒ Unrestricted

Financial Assessment Non-Cash Benefits

This section is specific to individual, not the household. An Income Assessment will be completed for each household member. Again, there are limited selections which will pertain to children (Medicaid).

Food Stamps/Money for Food on Benefits Card – Monthly payments provided to individual in advance in a tax refund, Food Stamps (Snaps) – A stamp or coupon, issued by the government to persons with low incomes that can be redeemed for food at stores

MEDICAID – A joint federal and state program that helps low-income individuals or families pay for the costs associated with long-term medical and custodial care provided they qualify. Although largely funded by the federal government, Medicaid is run by the state where coverage may vary

MEDICARE – A federal program that pays for certain health care expenses for people aged 65 or older

Special Supplemental Nutrition Program for Women, Infants and Children (WIC) – A program geared toward supplying nutritional food for at risk pregnant women and their families

Veteran's Administration Medical Services - Health care benefits and service

provided for Veterans

Section 8, Public Housing or Other Rental Assistance – Low- and moderate-income housing subsidized by the federal Department of Housing and Urban Development

Other Source – Any source not previously listed above

Click **“Save and Close”** when completed.

The screenshot shows the 'Financial Assessment' form for a client named Lily Flowers. The form is part of the IHCDA ClientTrack system. The left sidebar contains navigation links for HUD Program Intake, Basic Client Information, Family Members, Program Enrollment, Assessment, Barriers / Special Needs, Domestic Violence, Income, Non-Cash Benefits, Child Education, Case Management, Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Case Notes, and Paused Workflows. The main content area is titled 'Financial Assessment' and includes a sub-header 'Indicate below the client's sources of monthly income/benefits.' Below this, there are fields for 'Assessment Date' (09/07/2012), 'Income Received' (No), and 'Non-cash Benefits' (No). A table lists 7 records found, with columns for Type, Description, Monthly Amount, and Restriction. The records are: Food Stamps/Money for food on benefits card, MEDICAID, MEDICARE, Special Supplemental Nutrition Program for Women, Infants, and Children, Veteran's Administration Medical Services, Section 8, Public Housing, or Other Rental Assistance, and Other Source. The 'Count/Total Monthly Income' is 0, and the 'Restriction' is Unrestricted. The form has 'Save' and 'Save and Close' buttons at the bottom right.

Type	Description	Monthly Amount	Restriction
	Food Stamps/Money for food on benefits card		Unrestricted
	MEDICAID		Unrestricted
	MEDICARE		Unrestricted
	Special Supplemental Nutrition Program for Women, Infants, and Children		Unrestricted
	Veteran's Administration Medical Services		Unrestricted
	Section 8, Public Housing, or Other Rental Assistance		Unrestricted
	Other Source		Unrestricted

Child Education Assessment

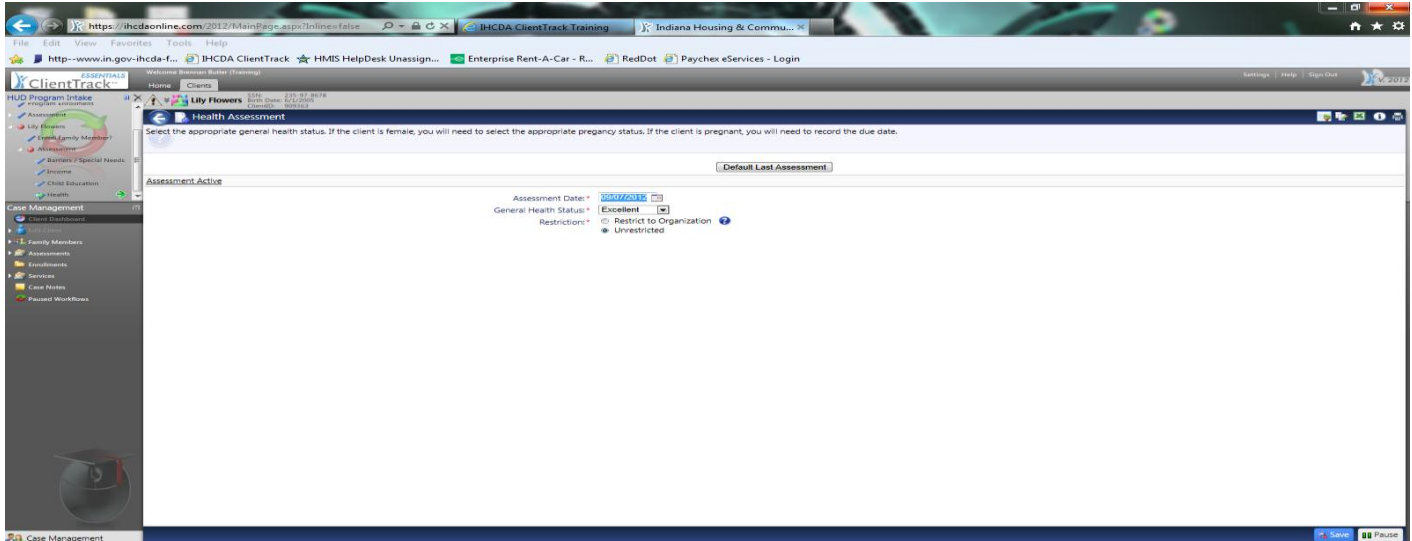
Enter the **“Highest Grade Completed”** for the child, and then select if the child is **“Currently Enrolled in School”**. The built in logic may require further information depending on how you answer the questions. Click **“Save”** when completed.

The screenshot shows the 'Child Education Assessment' form for a client named Lily Flowers. The form is part of the IHCDA ClientTrack system. The left sidebar contains navigation links for HUD Program Intake, Basic Client Information, Family Members, Program Enrollment, Assessment, Barriers / Special Needs, Domestic Violence, Income, Non-Cash Benefits, Child Education, Case Management, Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Case Notes, and Paused Workflows. The main content area is titled 'Child Education Assessment' and includes a sub-header 'Indicate if the child is currently enrolled in school at the time of assessment. If the child is enrolled, select the type of school and enter the school name. If the child is not enrolled, enter date of last enrollment and reasons why the child is not enrolled. Enter any additional comments.' Below this, there are fields for 'Assessment Date' (09/07/2012), 'Highest Grade Completed' (Nursery School to 4th Grade), 'Current Enrollment Status' (Yes), 'Type of School' (Public School), 'School Name' (IPS 56), 'Connected with McKinney-Vento School Liaison' (Yes), and 'Comments'. The 'Restriction' is Unrestricted. The form has 'Save' and 'Pause' buttons at the bottom right.

Type	Description	Monthly Amount	Restriction
	Food Stamps/Money for food on benefits card		Unrestricted
	MEDICAID		Unrestricted
	MEDICARE		Unrestricted
	Special Supplemental Nutrition Program for Women, Infants, and Children		Unrestricted
	Veteran's Administration Medical Services		Unrestricted
	Section 8, Public Housing, or Other Rental Assistance		Unrestricted
	Other Source		Unrestricted

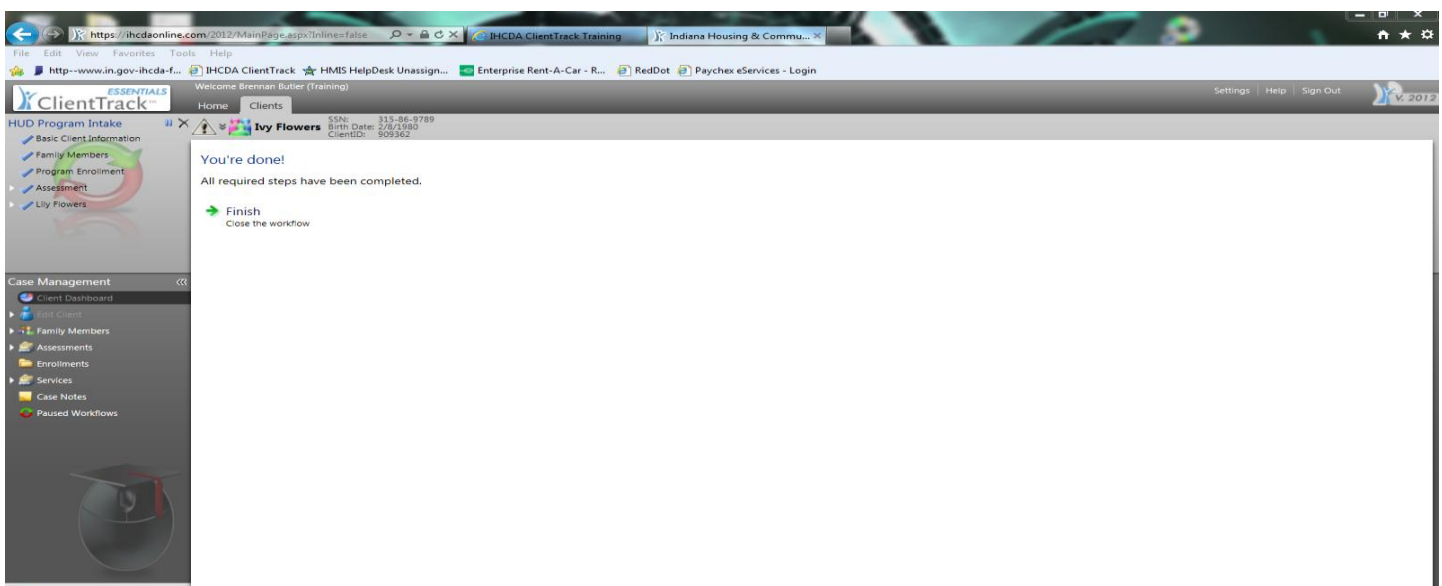
Health Assessment

The answer to this question is up to the client or the parent of the client. If you notice that they are not as they describe, then you would want to note that in your case notes. Click **“Save”** when completed.



The screenshot shows the IHCDA ClientTrack web application. The browser address bar displays <https://ihcdaonline.com/2012/MainPage.aspx?Inline=false>. The page title is "ClientTrack". The left sidebar contains a "Case Management" menu with options: Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Case Notes, and Paused Workflows. The main content area is titled "Health Assessment" and includes a sub-header "Select the appropriate general health status. If the client is female, you will need to select the appropriate pregnancy status if the client is pregnant, you will need to record the due date." Below this, there is a "Default Last Assessment" button. The "Assessment Active" section shows "Assessment Date: 10/20/12" and "General Health Status: Excellent". There are also radio buttons for "Restrictions" with options "Restrict to Organization" and "Unrestricted". At the bottom right, there are "Save" and "Finish" buttons.

All steps for the assessment and enrollment process have been completed. Upon clicking the **“Finish”** button, you will be redirected to the Dashboard for the Head of Household. It is from this screen you will begin to add services and case notes regarding the HMIS Program Enrollment.



The screenshot shows the IHCDA ClientTrack web application after completing the assessment. The browser address bar displays <https://ihcdaonline.com/2012/MainPage.aspx?Inline=false>. The page title is "ClientTrack". The left sidebar contains a "Case Management" menu with options: Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Case Notes, and Paused Workflows. The main content area displays a "You're done!" message: "All required steps have been completed." Below this, there is a green arrow icon next to the word "Finish" and a link "Close the workflow". At the bottom right, there are "Save" and "Finish" buttons.

The Client Dashboard

The Client Dashboard provides you with a great deal of information regarding the client. You can verify the basic client demographics, see the enrollment in a particular program, number of case members, enrollment date, the associated organization and when their last Assessment has been completed. It will also provide you with an “at a glance” look at the services the client has received.

While you will have the option on many screens for a “Don’t Know or Refused” option – which may be valid at time of intake – it is expected that as information is collected during the program enrollment the client information/assessments will be updated. The screen shots that follow will help you access a previously completed assessment should you need to make corrections.

The screenshot displays the IHCDA ClientTrack web application. The left sidebar contains a 'Case Management' menu with options like 'Client Dashboard', 'Edit Client', 'Family Members', 'Assessments', 'Enrollments', 'Services', 'Case Notes', and 'Paused Workflows'. The main content area is titled 'Ivy Flowers's Dashboard' and shows client information, a photo, and a table of enrollments.

Ivy Flowers's Information

Name:	Flowers, Ivy	Birth Date:	2/8/1980	Age:	32
Gender:	Female	Disabling Condition:	No	Veteran:	Yes
Ethnicity:	Non-Hispanic/Latino	Race:	Asian		

Ivy's Enrollments

Enrollment Description	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	Enroll ID	Exit ID
Current							
Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PH-R12-82)	2	09/07/2012		Aurora Inc	09/07/2012	1509937	

Ivy's Case Manager Assignments

Case Manager	Begin Date	Status	End Date	Enrollment
Brennan Butler	09/07/2012	Active		Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PH-R12-82)

Ivy's Services

Date	Service	Units	\$ Total	Organization
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Click on the “**Enrollment**” menu item on the left, or you can click on the “**Blue Bar**” that says “**Client Name Enrollments**”. Choose the enrollment that needs to be edited and click on the “**Blue Play Button**” to produce a drop down menu. You can either Edit Enrollment (maybe the date needs to be changed, name is misspelled, etc.) View Case Members, Case Summary Report, Perform During Program Enrollment Assessment or Exit the Enrollment.

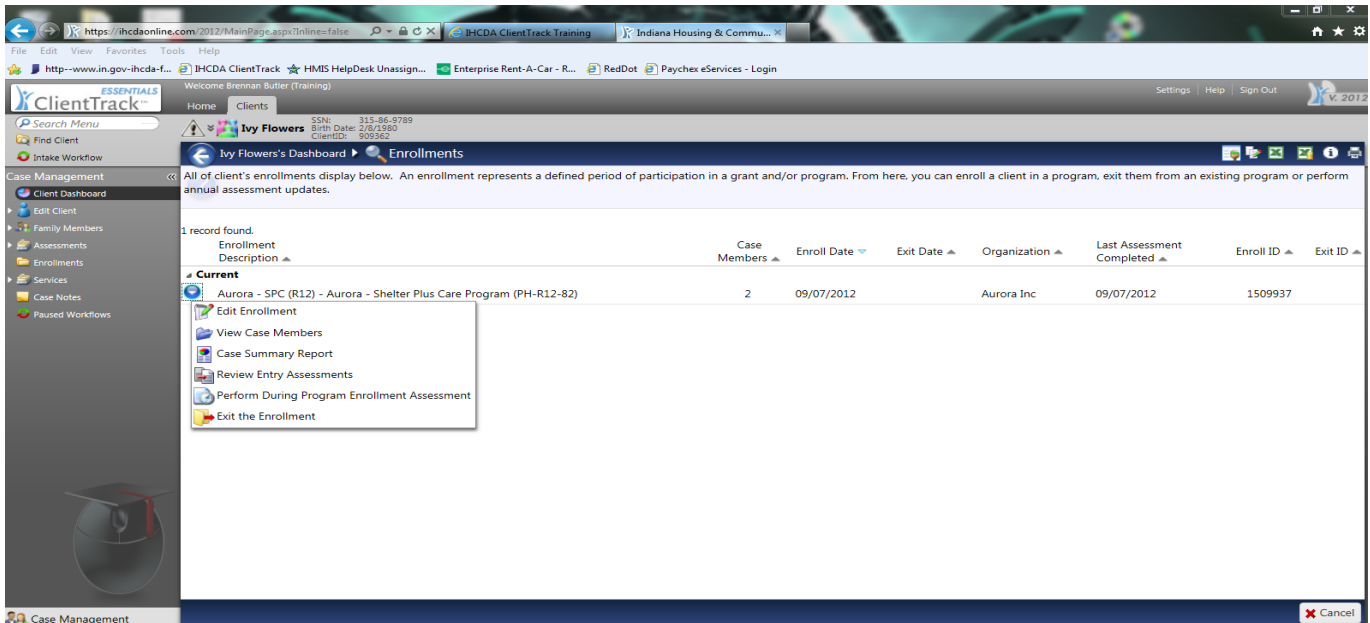
Tech Note

Household member icons are color-coded

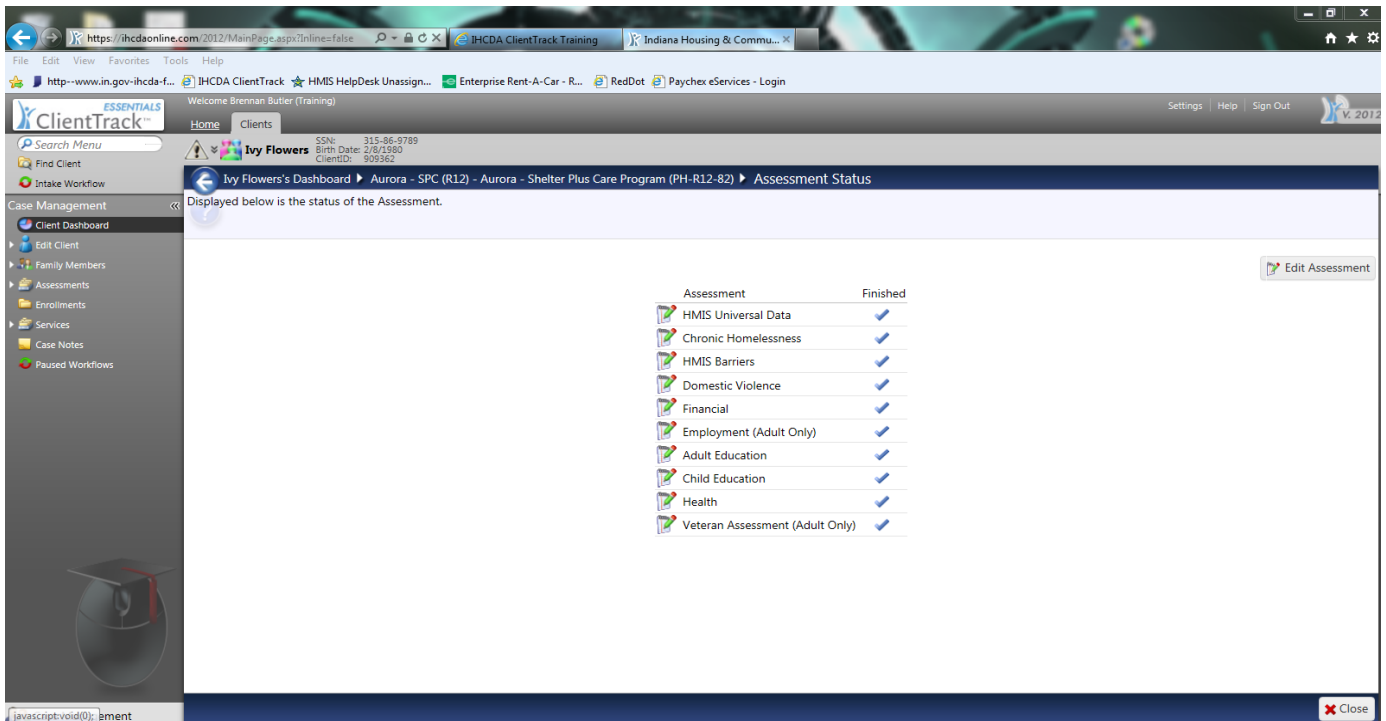
Adult male household members have a blue icon

Adult female household members have a pink icon

Children have a green icon

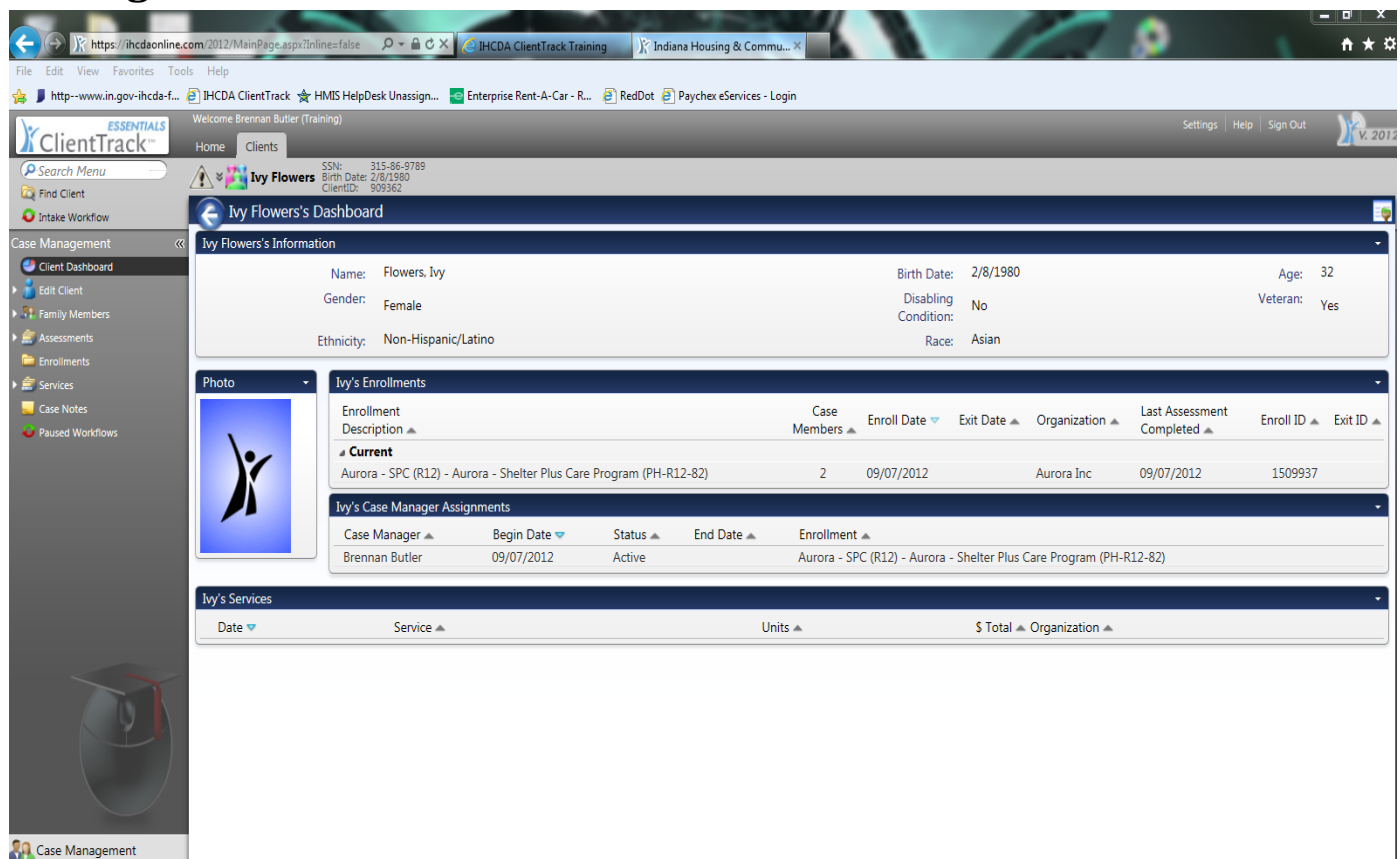


Click on “**Blue Play Button**” and then click on “**Review Entry Assessments**” in the drop down list.



As you can see when you select “Review Entry Assessments”, all required assessment have been completed. For instance, if a client does not disclose at entry they are receiving food stamps but you find out soon after their enrollment, you would want to **EDIT** the Financial Assessment (To “**Edit**” an assessment click on the “**Notepad with the Green Pencil**”, put in the updated information. Click “**Save**”). However, if the client **BEGAN** receiving Food Stamps while enrolled in your program (1-2 months later); **DO NOT** edit the entry assessment. This is a time to complete a “During Program Enrollment Assessment.” (This will be covered later in the manual)

Adding Services



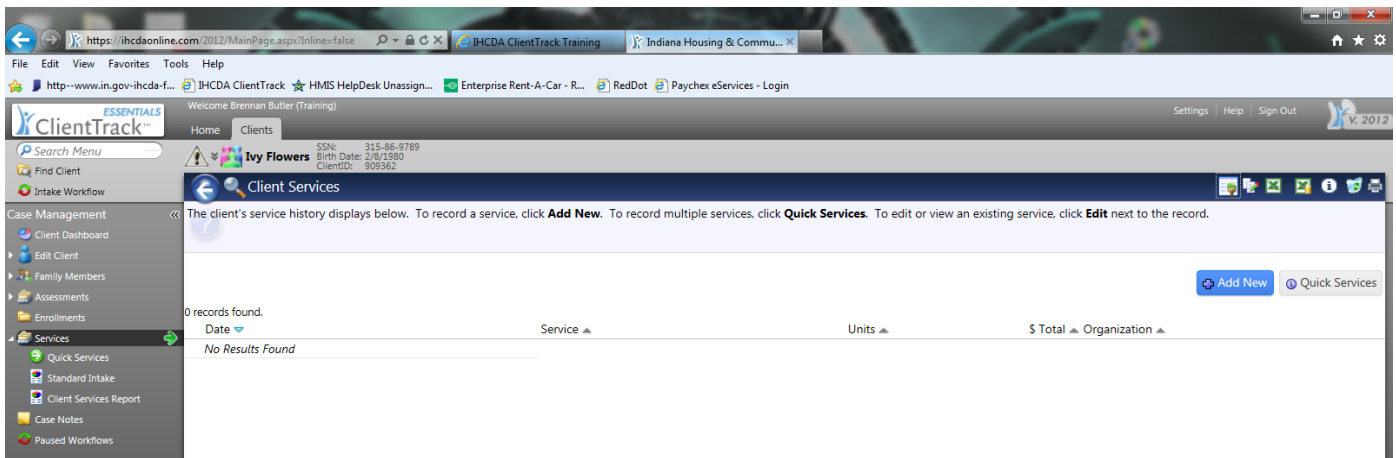
The screenshot shows the IHCDA ClientTrack system interface. The left sidebar contains a 'Case Management' menu with options like 'Client Dashboard', 'Edit Client', 'Family Members', 'Assessments', 'Enrollments', 'Services', 'Case Notes', and 'Paused Workflows'. The main content area displays 'Ivy Flowers's Dashboard' for client 'Ivy Flowers' (SSN: 315-86-9789, Birth Date: 2/8/1980, ClientID: 909362). The dashboard includes sections for 'Ivy Flowers's Information', 'Ivy's Enrollments', 'Ivy's Case Manager Assignments', and 'Ivy's Services'.

Ivy's Enrollments							
Enrollment Description	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	Enroll ID	Exit ID
Current							
Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PH-R12-82)	2	09/07/2012		Aurora Inc	09/07/2012	1509937	

Ivy's Case Manager Assignments				
Case Manager	Begin Date	Status	End Date	Enrollment
Brennan Butler	09/07/2012	Active		Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PH-R12-82)

Ivy's Services			
Date	Service	Units	\$ Total
Organization			

To add services go to the left hand menu items, and then click on the “**Services**” link, this will open the Services Window.



Click on the “**Add New**” Button

NOTE – You will have the option to Add Quick Services (for use when you are adding multiple services for a client that were performed on the same day). For services that may require some additional information, use the Add New button.

You now see the **Services Screen**, you will need to **select your grant, enrollment, and the service provided**. You can also enter units to track costs. The comments section can be used for reminders; however, this is not the area to write your case notes. Case Notes will be covered later in the manual. When you are finished documenting services click on the “**Save**” Button.

Family Income:

Income	Family Income	Family Members	Poverty Level	% of Poverty
\$1,800.00	\$1,800.00	2	\$1,260.83	142.76 %

Grant: Aurora - SPC (R12)

Enrollment: 09/07/2012 - Aurora - Shelter Plus Care Program (PH-R12-82)

Service: Case/Care Management

Provider:

Location: Aurora Inc - Main

Date: 09/07/2012

Units: 1.00

Unit Value: \$0.00

Total: \$0.00

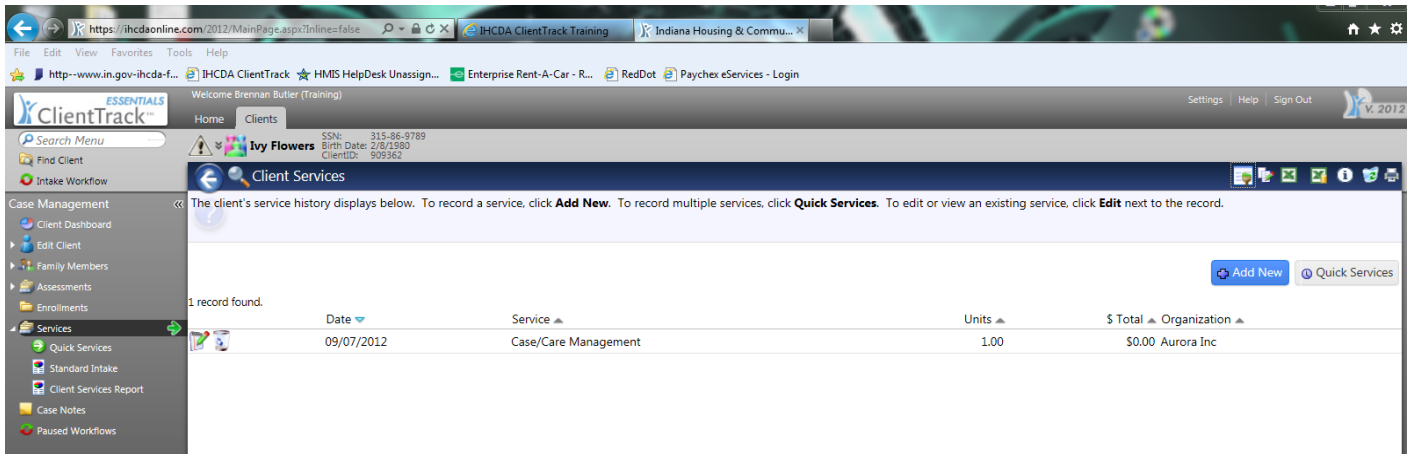
User Performing the Service: Brennan Butler

Comments:

Restriction: ☐ Restrict to Organization ☒ Unrestricted

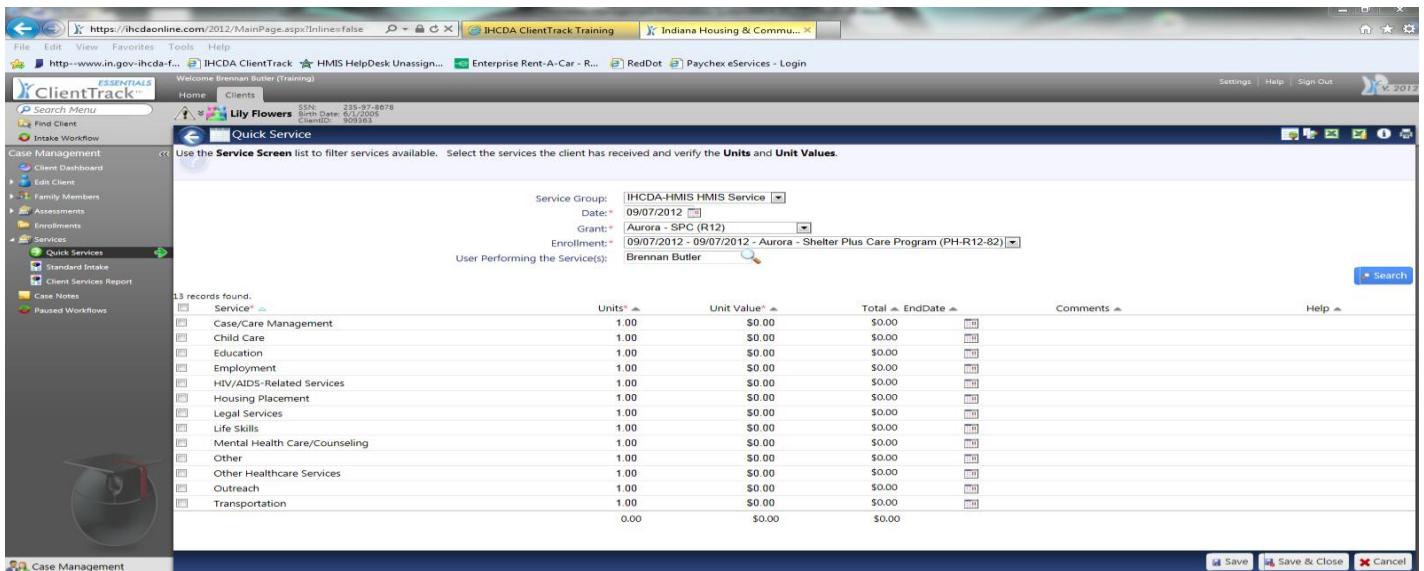
Buttons: Save, Pause, Cancel

Once you have clicked on the **“Save”** Button, you will be brought back to the Service home screen, from here you are able to edit or delete a service that you provided.



Quick Services

When you are adding more than one service on a client, the easiest way will be to use the **“Quick Services”** Button located at the top right corner of your screen next to the **“Add New”** button. With this feature you will be able to add multiple services to a client at one time. You will need to select your **“Grant and Enrollment”**, as well as the **“Check Box”** next to the Service you provided. Once you are finished adding services click on the **“Save and Close”** Button.



Case Notes

Timely and robust case notes assist you and other case managers at your organization in serving your clients. It is extremely important that meetings, calls and other relevant information regarding your client are properly documented in their case notes.

To add Case Notes, click on the “**Case Notes**” Menu Item on the left of the screen. Click on the “**Add New**” button on the upper right hand side of the screen. Remember, these case notes will be restricted to case managers in your organization so if you are apt to use abbreviations, make sure others in your agency will be able to decipher what you have written. While ClientTrack™ will eventually provide a date in the body of the case note; it is also good practice to add the date in your case note.

The screenshot displays the IHCDA ClientTrack Training web application. The browser address bar shows the URL: <https://ihcdaonline.com/2012/MainPage.aspx?Inline=false>. The application header includes the ClientTrack logo and a welcome message for Brennan Butler (Training). The left sidebar contains a navigation menu with options like Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Quick Services, Standard Intake, Client Services Report, Case Notes (highlighted), and Paused Workflows. The main content area is titled "Client Case Notes" and displays a message: "The client's case note history displays below. To create a new case note, click **Add New**. To view or edit a case note, click **Edit Case Note** next to the record. To preview and print case notes, check the Print box next to one or more case notes, and then click **Print Selected**." Below this message, there are buttons for "Add New" and "Print Selected". A table header is visible with columns: "Print", "Date", "Regarding", "User", and "Organization". The table currently shows "0 records found" and "No Results Found". The bottom status bar indicates "Case Management" and includes a "Cancel" button.

Here is an example of Case Notes:

The screenshot shows the IHCDA ClientTrack web application. The left sidebar contains a 'Search Menu' with options like 'Find Client', 'Intake Workflow', 'Case Management', 'Client Dashboard', 'Edit Client', 'Family Members', 'Assessments', 'Enrollments', 'Services', 'Quick Services', 'Standard Intake', 'Client Services Report', 'Case Notes', and 'Paused Workflows'. The main content area is titled 'Client Case Notes' and 'Case Note'. It includes fields for 'Entry Date' (09/07/2012), 'User' (Brennan Butler), and 'Regarding' (Client Enrollment). Below these is a text editor with a 'Case Note' template. The note text reads: 'Met with client and daughter. Completed client interview and case management enrollment, both members are now in program. Family has been impacted by the father leaving. Deceased was primary bread winner therefore leaving the family with minimal income, however, they have just started receiving child support. Family has been evicted from apartment and will reside in shelter. Client will work with job coach to obtain employment. Client will meet with counselor. Client Name: Ivy Flowers'. At the bottom right, there are buttons for 'Save', 'Pause', and 'Cancel'. A 'Read Only' checkbox is also present, with 'Restrict to Organization' selected.

Once you have added your Case Notes click on the **“Save”** button at the bottom of the screen. You will be re-directed to the Case Notes screen, where you will be able to print, edit, or delete your case notes.

The screenshot shows the 'Client Case Notes' screen. It includes a message: 'The client's case note history displays below. To create a new case note, click **Add New**. To view or edit a case note, click **Edit Case Note** next to the record. To preview and print case notes, check the Print box next to one or more case notes, and then click **Print Selected**.' Below this is a table with one record found.

	Print	Date	Regarding	User	Organization
<input type="checkbox"/>		09/07/2012	Client Enrollment	Brennan Butler	Aurora Inc

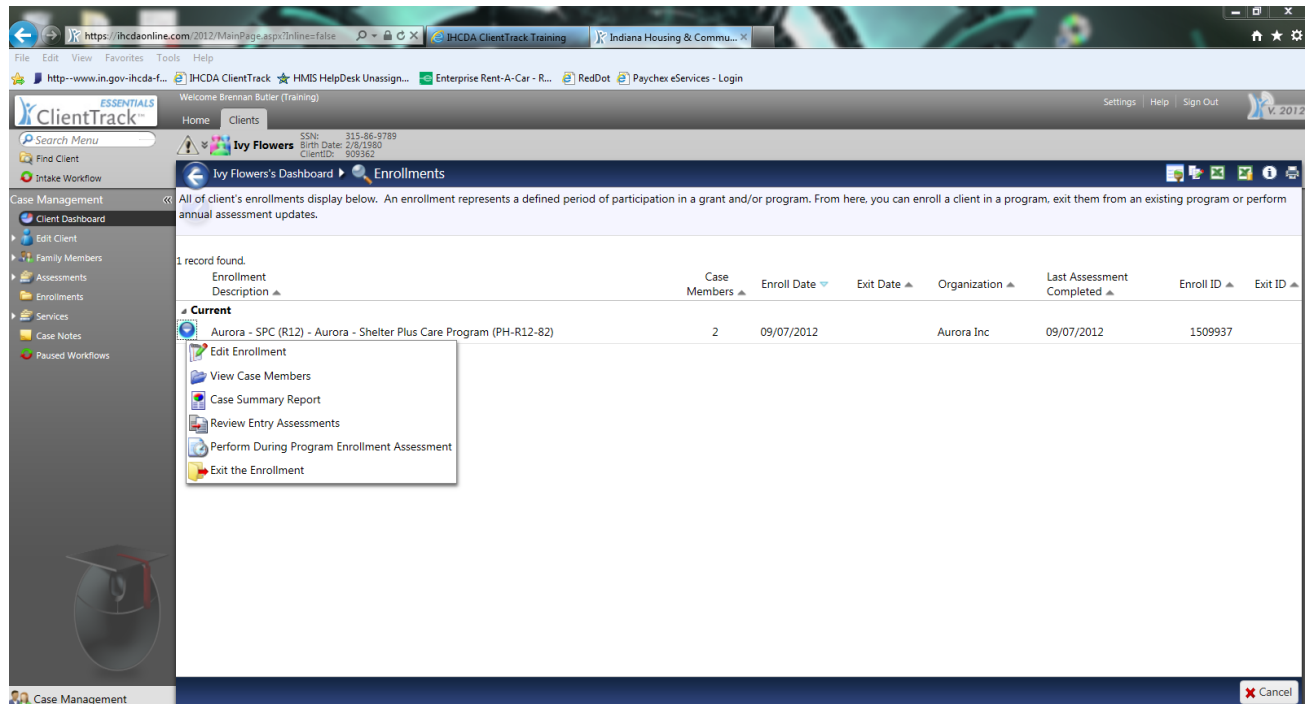
At the top right of the table area are buttons for 'Add New' and 'Print Selected'.

During Program Assessment

For clients that spend longer periods of time in your program, you now have access to a “During Program Assessment”. This assessment is now required if you have clients in your program for a year or longer. You may also want to complete this

assessment if you have a new member (birth of a child) to the household or if someone in the household departs (divorce) your program. You can also use this workflow to track and maintain significant changes to a household income, etc. For your convenience, the assessment has been developed as a workflow with the following steps:

To perform a During Program Assessment click on either the **“Enrollments”** link on the left hand menu area, or you can click on the blue bar that says **“Client Name Enrollments”**, either of these will take you to the Enrollments screen.



Click the **“Blue Play Button”**, and then click on **“Perform During Program Enrollment Assessment”**, this will launch a During Program Enrollment Assessment Workflow. For your convenience, the assessment has been developed as a workflow with the following steps (For further instructions look back at Enrolling a client):

1. Verify and make any necessary changes to basic client information
2. Verify and make any necessary changes to household information
3. Master Assessment-During Program Enrollment
is completed
 - a. Review of HMIS Barriers
 - b. Financial Assessment (Cash and Non-cash)
 - c. Employment Assessment
 - d. Education Assessment

- e. Health Assessment
- f. Perform Household Members Assessments
4. Click **“Finish”** and you will be redirected to the Client Dashboard

Exit Client

To **“Exit”** a client from the program/enrollment, you can either click on the **“Enrollments”** link on the left hand menu bar, or you can click on the blue bar that says **“Client Name Enrollments”**. This will take you to the **“Enrollments”** screen.

The screenshot displays the IHCDA ClientTrack system interface. At the top, the browser address bar shows the URL <https://ihcdaonline.com/2012/MainPage.aspx?inline=false>. The page header includes the ClientTrack logo and a search menu. The main content area is titled "Ivy Flowers's Dashboard" and contains several sections:

- Ivy Flowers's Information:** A table displaying client details.

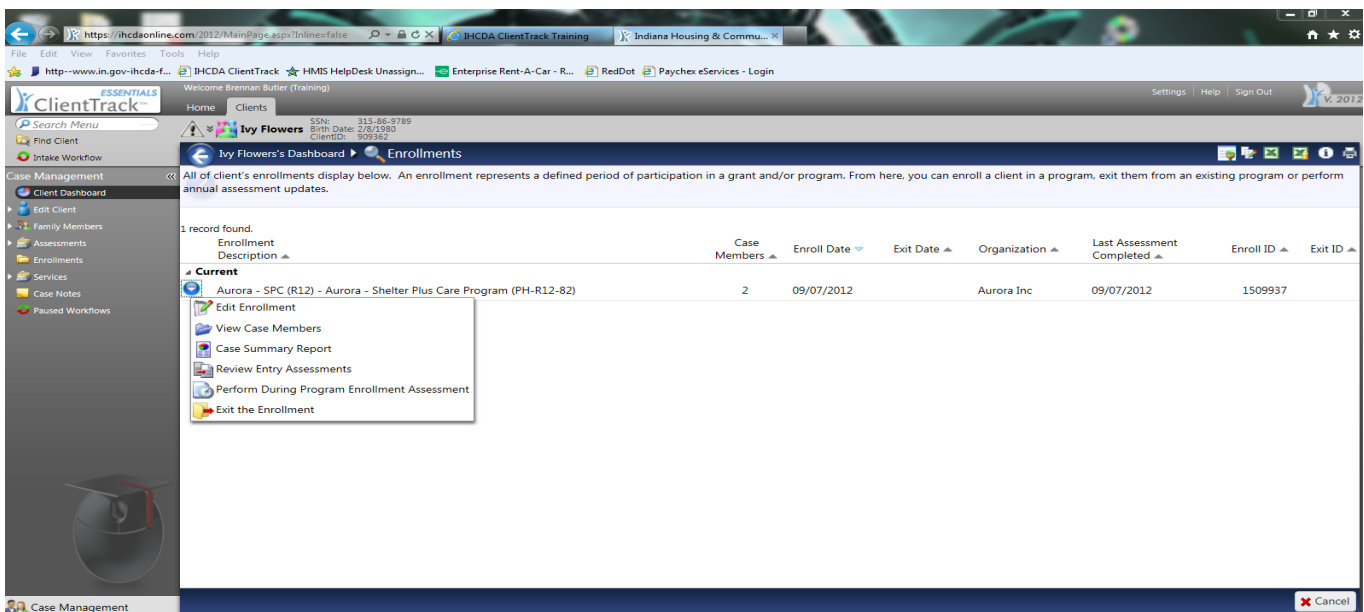
Name:	Flowers, Ivy	Birth Date:	2/8/1980	Age:	32
Gender:	Female	Disabling Condition:	No	Veteran:	Yes
Ethnicity:	Non-Hispanic/Latino	Race:	Asian		
- Photo:** A placeholder image of a person.
- Ivy's Enrollments:** A table showing enrollment details.

Enrollment Description	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	Enroll ID	Exit ID
Current							
Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PH-R12-82)	2	09/07/2012		Aurora Inc	09/07/2012	1509937	
- Ivy's Case Manager Assignments:** A table showing case manager details.

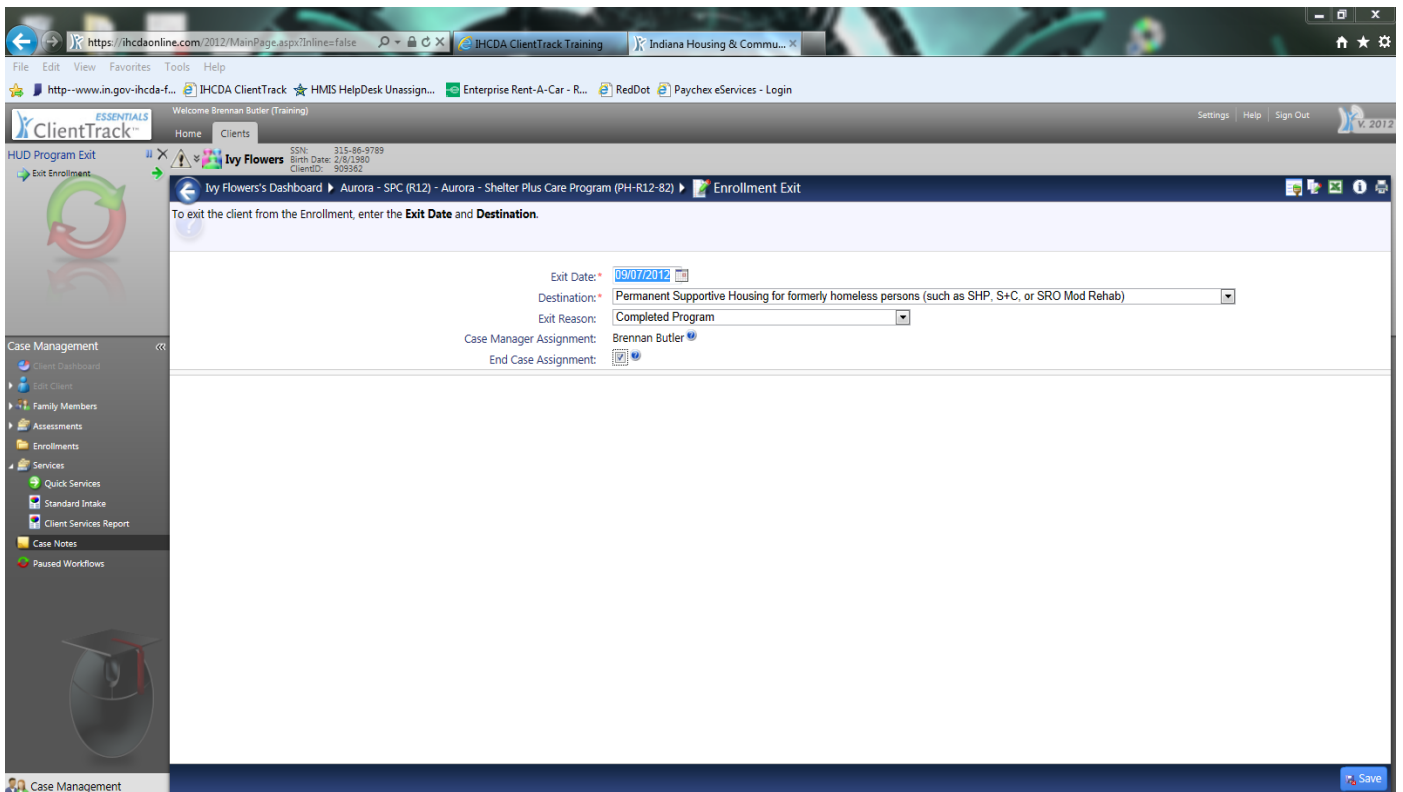
Case Manager	Begin Date	Status	End Date	Enrollment
Brennan Butler	09/07/2012	Active		Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PH-R12-82)
- Ivy's Services:** A table showing service details.

Date	Service	Units	\$ Total	Organization
09/07/2012	Case/Care Management	1.00	\$0.00	Aurora Inc

To **“Exit”** a client click on the **“Blue Play Button”** and then click on the folder icon with the red arrow named **“Exit the Enrollment”**. This will launch an Exit Workflow.



Next, you will need to fill in the **“Exit Date”**, if you are doing back-data entry you will need to ensure that this has the correct date. Then you will fill in the Destination of the client as well as the Exit Reason. To remove someone from your Case Assignment, click on the check box next to **“End Case Assignment”**.



Universal Data Assessment

Fill in the Housing Status for the client.

Literally Homeless – Individual or household who lacks a fixed, regular, and adequate nighttime residence

Unstably Housed – at risk of losing their housing

Imminently losing their housing – individual or household who will imminently lose their primary nighttime residence (within 14 days)

Stably Housed – Rent

Stably Housed – Own

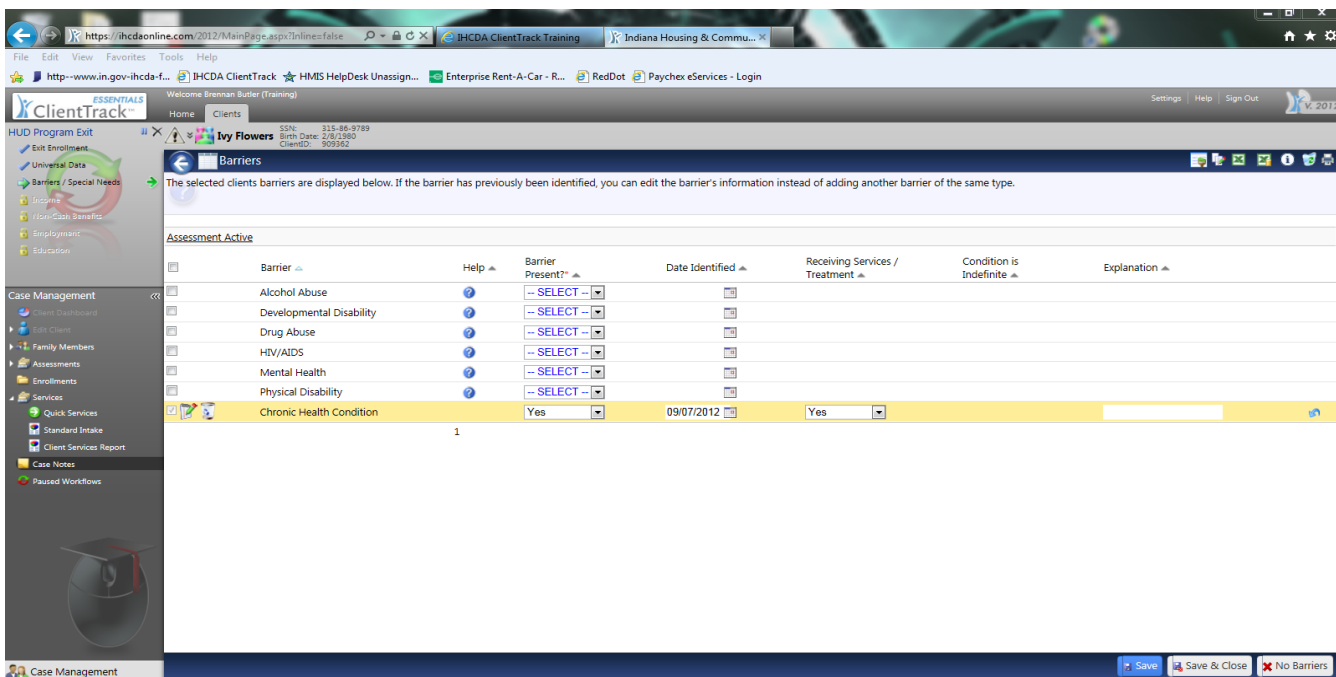
Don't Know – Client has left and you don't know where they have gone

Refused – Client refused to give you any information

Other – Any housing status that is not above.

The screenshot displays the IHCD ClientTrack web application. The browser address bar shows the URL: https://ihcdonline.com/2012/MainPage.aspx?Inlines=false. The page title is "IHCD ClientTrack Training". The user is logged in as "Ivy Flowers" with SSN: 315-86-9789, Birth Date: 2/8/1990, and ClientID: 909362. The left sidebar contains a navigation menu with options like "HUD Program Exit", "Universal Data", "Barriers/Special Needs", "Income", "Housing Benefits", "Employment", "Education", "Case Management", "Client Dashboard", "Add Client", "Family Members", "Assessments", "Enrollments", "Services", "Quick Services", "Standard Intake", "Client Services Report", "Case Notes", and "Paused Workflows". The main content area is titled "Universal Data Assessment" and includes instructions: "Complete the information below related to the selected client's housing status and other relevant information." There are two buttons: "Default Client's Last Assessment" and "Default Information From Head of Household". Below these, the "Assessment Active" section shows the "Assessment Date" as 09/30/2012. The "Housing Status" section contains a dropdown menu currently set to "Stably Housed - Rent" and a "Restriction" section with radio buttons for "Restrict to Organization" and "Unrestricted". At the bottom right, there are "Save" and "Pause" buttons.

You will now be required to complete the HMIS Barriers assessment. The built in logic may create additional fields that are required. All fields with a red * are required. If the client has no barriers, click on the No Barriers button in the lower right hand corner. It is important to keep in mind that clients must have at least one barrier to be eligible for some programs (such as Shelter + Care). Click **"Save & Close"** when completed.



Financial Assessment

An Income Assessment will be completed for EACH household member. Income received by a household member such as child support, TANF, WIC, and food stamps should be designated on the assessment of the household member that directly receives the payment. If an adult receives an SSI or SSDI benefit on behalf of a child, that income should be designated on the income assessment of the child. It is very important that income (cash or non-cash) is properly designated on the proper client assessment.

Earned Income – Employment income

Other Income – Any income not previously listed

Unemployment Insurance – Unemployment benefits from the State

Private Disability Insurance – Non-government funded disability payments

Worker's Compensation – Income for individual who has been injured on the job

Self-Employment – Income earned by an individual who works for themselves

Supplemental Security Income – A federal program that provides additional income for older and disabled people with little to no income stream

Veteran's Disability Payment – Disability payment provided by the Department of Veteran's Affairs

Social Security Disability Income – A monthly compensation to individuals who can no longer work due to their medical conditions

Retirement (Social Security) – Income payment provided by government for

individuals that qualify

Other Pension – Cash payment made from a private employer

Veteran's Pension – Cash payment made by the Department of Veteran's Affairs

Veteran's Disability Payment – A benefit paid to a veteran because of injuries or diseases that happened while on active duty, or were made worse by active duty

Child Support – Income received from one parent to another to care for children

TANF –Temporary Assistance for Needy Families

General Assistance – Cash from household or friends, trustee or church/non-profit

Click **"Save and Close"** when completed.

The screenshot shows the 'Financial Assessment' form in the IHCD ClientTrack system. The client is Ivy Flowers, SSN: 315-86-9789, born 2/8/2080, client ID 309302. The assessment date is 09/07/2012, and income received is 'Yes'. Non-cash benefits are also 'Yes'. The income group is 'Cash Income'. The form lists 15 records found, including Earned Income (\$2,000.00), Other Income, Unemployment Insurance, Private Disability Insurance, Worker's Compensation, Self Employment, Supplemental Security Income, Social Security Disability Income, Retirement (Social Security), Other Pension, Veteran's Pension, Veteran's Disability Payment, Child Support (\$300.00), TANF, and General Assistance. The total monthly income is \$2,300.00. The form includes a 'Save and Close' button at the bottom right.

Type	Description	Monthly Amount	Restriction
✓	Earned Income	\$2,000.00	Unrestricted
	Other Income		Unrestricted
	Unemployment Insurance		Unrestricted
	Private Disability Insurance		Unrestricted
	Worker's Compensation		Unrestricted
	Self Employment		Unrestricted
	Supplemental Security Income		Unrestricted
	Social Security Disability Income		Unrestricted
	Retirement (Social Security)		Unrestricted
	Other Pension		Unrestricted
	Veteran's Pension		Unrestricted
	Veteran's Disability Payment		Unrestricted
✓	Child Support	\$300.00	Unrestricted
	TANF		Unrestricted
	General Assistance		Unrestricted

Financial Assessment Non-Cash Benefits

This section is specific to an individual, not the household. An Income Assessment will be completed for each household member. Again, there are limited selections that will pertain to children (Medicaid).

Food Stamps/Money for Food on Benefits Card – Monthly payments provided to individual in advance in a tax refund, Food Stamps (Snaps) – A stamp or coupon, issued by the government to persons with low incomes that

can be redeemed for food at stores

MEDICAID – A joint federal and state program that helps low-income individuals or families pay for the costs associated with long-term medical and custodial care provided they qualify. Although largely funded by the federal government, Medicaid is run by the state where coverage may vary

MEDICARE – A federal program that pays for certain health care expenses for people aged 65 or older

Special Supplemental Nutrition Program for Women, Infants and Children (WIC) – A program geared toward supplying nutritional food for at risk pregnant women and their families

Veteran's Administration Medical Services - Health care benefits and services provided for Veterans

Section 8, Public Housing or Other Rental Assistance – Low- and moderate-income housing subsidized by the federal Department of Housing and Urban Development

Other Source – Any source not previously listed above.

Click “Save and Close” when completed.

The screenshot shows the IHCDA ClientTrack Financial Assessment form. The form is titled "Financial Assessment" and includes a sidebar with navigation options like "HUD Program Exit", "Universal Data", "Income", "Non-Cash Benefits", "Employment", and "Education". The main form area contains fields for "Assessment Date" (09/07/2012), "Income Received" (Yes), and "Non-cash Benefits" (Yes). Below these fields is a table with 7 records found, listing various income sources and their restrictions. The table has columns for "Type", "Description", "Monthly Amount", and "Restriction". The "MEDICAID" row is highlighted in yellow. At the bottom of the table, there is a summary row for "Count/Total Monthly Income" showing a count of 1 and a total of \$0.00. The form also includes a "Restriction" dropdown menu and a "Save and Close" button.

Type	Description	Monthly Amount	Restriction
	Food Stamps/Money for food on benefits card		Unrestricted
	MEDICAID		Unrestricted
	MEDICARE		Unrestricted
	Special Supplemental Nutrition Program for Women, Infants, and Children		Unrestricted
	Veteran's Administration Medical Services		Unrestricted
	Section 8, Public Housing, or Other Rental Assistance		Unrestricted
	Other Source		Unrestricted

Count/Total Monthly Income: 1 \$0.00

Restriction: ☐ Restrict to Organization ☒ Unrestricted

Save Save and Close

Employment Assessment

When filling out the Employment Assessment, be aware that the built in logic may require you to fill out additional information. Click **“Save”** when completed.

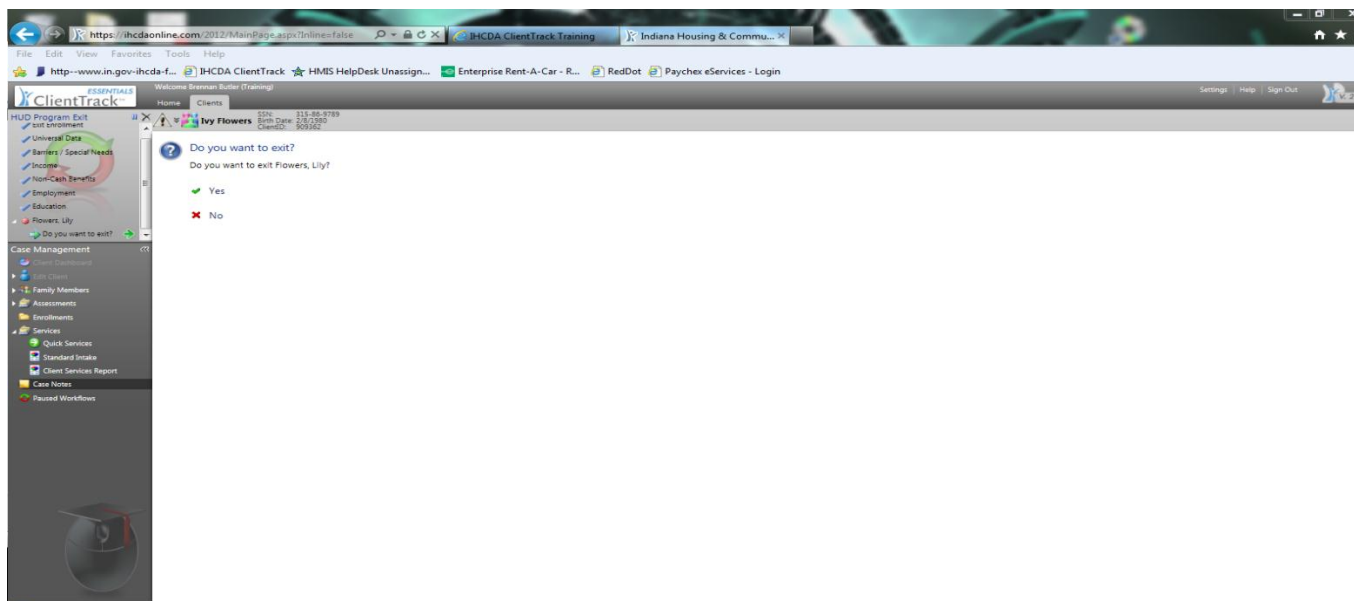
The screenshot shows the IHCDA ClientTrack web application. The left sidebar contains navigation links for HUD Program Exit, Universal Data, Barriers / Special Needs, Income, Non-Cash Benefits, Employment, Education, Case Management, and Paused Workflows. The main content area is titled 'Employment Assessment' and includes instructions: 'Check the appropriate employment status at the time of assessment. If the client is employed, record the hours worked in the week prior to assessment, and select the tenure of the employment position. If the client is not employed, indicate if the client is looking for work.' The form fields are: Assessment Date (09/07/2012), Employed? (Yes), Hours Worked In Last Week (40.00), Employment Tenure (Permanent), Looking for additional employment / increased hours (No), and Restriction (Unrestricted). At the bottom right are 'Save' and 'No Changes' buttons.

Adult Education Assessment

When filling out the Adult Education Assessment, remember that certain answers will prompt the built in logic to require more information. Please note that if a client has had some secondary education, that you have selected “Post-Secondary School” and then select “None” in the Secondary Education box. Click **“Save”** to continue.

The screenshot shows the IHCDA ClientTrack web application. The left sidebar is the same as the previous screenshot. The main content area is titled 'Adult Education Assessment' and includes instructions: 'Indicate if the client is enrolled in an education or training program or working toward a degree at the time of assessment. Indicate if the client has completed vocational training or received an apprenticeship. Select Highest Grade Completed. If the client has completed a high school diploma or above, select the secondary education degree(s) the client has earned.' The form fields are: Assessment Date (09/07/2012), Currently in School / Working on Degree? (Yes), Received Vocational Training/Apprenticeship? (Yes), Highest Grade Completed (Post-secondary school), Secondary Education (None), and Restriction (Unrestricted). At the bottom right are 'Save' and 'Pause' buttons.

Click the **“Yes”** Button to exit the next household member, and so on until all members are exited from the program. You will then be re-directed to the Client Dashboard.



Log out of ClientTrack

Ivy Flowers's Dashboard

Ivy Flowers's Information

Name:	Flowers, Ivy	Birth Date:	2/8/1980	Age:	32
Gender:	Female	Disabling Condition:	No	Veteran:	Yes
Ethnicity:	Non-Hispanic/Latino	Race:	Asian		

Ivy's Enrollments

Enrollment Description	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	Enroll ID	Exit ID
Previous							
Aurora - SHP Outreach (R12) - Aurora - Outreach Team (SSO-R12-82)	2	09/07/2012	09/11/2012	Aurora Inc	09/11/2012	1509941	
Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PH-R12-82)	2	09/07/2012	09/07/2012	Aurora Inc	09/07/2012	1509937	1509939

Ivy's Case Manager Assignments

Case Manager	Begin Date	Status	End Date	Enrollment
Brennan Butler	09/07/2012	Inactive	09/07/2012	Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PH-R12-82)
Brennan Butler	09/07/2012	Inactive	09/11/2012	Aurora - SHP Outreach (R12) - Aurora - Outreach Team (SSO-R12-82)

Ivy's Services

Date	Service	Units	\$ Total	Organization
09/07/2012	Case/Care Management	1.00	\$0.00	Aurora Inc
09/07/2012	Service			Evansville Rescue Mission

To log out of ClientTrack, click on the **“Sign Out”** link at the top right hand corner of your screen.

How to Contact the Help Desk

- Email the help desk at HMISHelpDesk@ihcdaonline.com
- Include:
 - Your Name
 - Contact Phone Number
 - Agency Name
 - Program you are working with
 - A description of the issues you are having
 - If possible a screen shot of the error you are receiving
- Allow 1– 2 business days to receive a response.

Notes

- Please remember, the **“Save”** button will save the changes you made to the screen and leave you on the same page. The **“Save & Close”** button will save the changes you have made to the screen and move you to the next one.
- IHCD A will monitor time between user logins and your ClientTrack™ account will be deactivated after 30 days of inactivity.
- Grant and program information must be set up in the system before you can begin to enroll clients. You must give adequate time to IHCD A in order for the set up in ClientTrack™ to be completed.
- While you will have the option on many screens for a “Don’t Know or Refused” option – which may be valid at time of intake – it is expected that as information is collected during the program enrollment the client information/assessments will be updated